

Oracle® Student System

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Send Us Your Comments

Oracle Student System Implementation and Administration Guide, Release 11i

Part No. B13575-01

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

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Preface

Welcome to the Oracle Student System Implementation and Administration Guide, Release 11*i*.

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

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

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

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

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

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

How To Use This Guide

The Oracle Student System Implementation and Administration Guide contains the information you need to understand and use Oracle Student System.

Documentation Accessibility

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

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

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

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

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

Online Documentation

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

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help -** You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to

your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Guides Related to This Product

Oracle Student System User's Guide

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

Oracle Student System for the United Kingdom User's Guide

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

Oracle Student System Open Interfaces User's Guide

The Oracle Student System Open Interfaces User's Guide provides information on importing data into and transferring data within Oracle Student System. You can also export data from Oracle Student System to another Oracle application or third party software for processing and then import the processed data into Oracle Student System.

Oracle Self-Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self-Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Student System with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Student System.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Student System and reach full productivity quickly. These courses are

organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

Support

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

OracleMetaLink

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

Product 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.

This chapter details the following topics:

- Overview
- Integration with Other Products
- General Guidelines

1.1 Overview

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 you easy access to important records, information, and services.

This section details the following subsystems within Oracle Student System:

- System Wide Services
- Program Structure and Planning
- Inquiry
- Admission
- Enrollment

- Research
- Academic Records
- Advising
- Student Finance
- Financial Aid
- Student Recruiting
- Rules

1.1.1 System Wide Services

System Wide Services provides the structural framework for Oracle Student System. Several of these subsystems consist entirely of setup.

Setup is discussed in detail in *Oracle Student System Implementation and Administration Guide*.

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.

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.

Tracking

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

1.1.2 Program Structure and Planning

You can use the Program Structure and Planning subsystem to add and maintain details about program, program groups, units, unit sets, and unit sections.

Information from this subsystem is used by several other subsystems, such as Admission, Advanced Standing, Assessments, and Financial Aid.

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

1.1.3 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.

1.1.4 Admission

The Admission subsystem is used to maintain applications received during the admission period. 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. Admission 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.

1.1.5 Enrollment

Using Enrollment, you can manage all enrollment-related activities. 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.

Using self-service, you can search for units, add or drop units, and view schedules, eligibility restrictions, special permissions, enrollment overrides, and timeslot assignments.

1.1.6 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.

1.1.7 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.

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.

Assessments

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

Graduation

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

Order Documents

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

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.

1.1.8 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.

1.1.9 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.

1.1.10 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.

1.1.11 Student Recruiting

Oracle Student System works with the Oracle Sales and Marketing products to target and provide one-to-one marketing to prospective students. The marketing and sales applications allow you to create target lists and personalized marketing messages, maintain deadlines, and organize on or off campus events.

1.1.12 Rules

Rules govern the behavior of Oracle Student System. You can modify some seeded rules to adapt to your business practices.

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

1.2 Integration with Other Products

Oracle Student System can be used with several other 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 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. 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.

1.3 General Guidelines

1.3.1 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.

1.3.2 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 guide.

1.3.3 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 the header region.

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

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

1.3.4 Save Step

To save your work, use the following:

File > Save or File > Save and Proceed

1.3.5 Parent Child Relationship

Note: Closing a parent record will not close the associated child record(s). Every child record must be closed manually.

For example, an institution has originally defined program types (parent) and programs (children) as described in the following table:

Table 1–1 Parent Child Relationship Example

Admission Category (parent)	Admission Process Category (child)
Graduate	Graduate / Program Admission Process

When you close the Admission Category: Graduate (parent record), you must close the Admission Process Category: Graduate/Program Admission Process (child record).

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

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

What's New in This Release

2.1 What's New in This Release

Oracle Student System has modified several features in this release. The following is a high level overview. See *Oracle Student System User Guide* for more information.

- System Wide Services
 - Correspondence
 - Dynamic Person ID Group
 - Duplicate Record Identification
 - Person Business Event
 - Organizational Structure System Alternate Identifiers
 - Security Framework and Setup
- Program Structure and Planning
 - Student Placements
 - Class Standing
 - Inheritance
 - Integration Enhancements
- Admissions
 - Tracking
 - Financial Aid Integration
 - Trading Community Architecture Enhancements
- Enrollment

- Prevention of Dropping Core Units
- Core and Optional Enrollment Enhancement
- Notifications
- Waitlist Enhancements
- Bulk Unit Attempt Upload
- Placement
- Self-Service Schedule
- Term Records
- Records
 - Basic Grade Book
 - Tracking
 - UK - Summary Measures of Attainment
- Student Finance
 - Payment Plans
 - Unit Sets in Rate Table
 - Audit and Special Fees
- Financial Aid
 - College Board Institutional Methodology
 - Multiple Financial Aid Offices
 - Yearly Updates
 - Pell Grant / Direct Loan Updates
 - Verification Enhancements
 - Loan Enhancements
 - Awarding Enhancements
- HESA
 - Override MSFUND for Program Offering Option
 - Cost Centre Subject Code Apportioning for Program
 - Organizational Structure System Alternate Identifiers

- Integration with Modified Program Completion

2.2 System Wide Services

In this release, Correspondence features have been added, dynamic person ID group creation is enhanced, and duplicate record identification is enhanced.

Correspondence

New features in One-to-One Fulfillment such as resending correspondence letters and master document editors enhance Correspondence functionality.

Dynamic Person ID Group

New user interfaces show Oracle Discoverer queries and lists on an Oracle Student System self-service page.

Duplicate Record Identification

Matching person records functionality is enhanced. In addition, you can now match newly created institution records against existing institution records.

Person Business Event

In this release, a business event is raised when a residency status or class is updated or an address is updated.

Organizational Structure System Alternate Identifiers

Seed new System Organizational ID Types for use by Financial Aid and the United Kingdom (UK). This will support the Financial Aid module's need to support multiple financial aid offices within Oracle Student System. The UK will use this institution identifier to map the Higher Education Statistical Agency (HESA) previous institution code to the identifier in Oracle Student System.

Security Framework and Setup

In this release, you can use a framework and user interface to maintain the security and integrity of Oracle Student System by controlling access to the data within it at greater levels of granularity in the Admissions subsystem application process.

2.3 Program Structure and Planning

In this release, Program Structure and Planning is enhanced to better integrate with Student Finance and Enrollment. In addition, inheritance hierarchy is enhanced.

Student Placements

In this release, you can maintain placement experience information for activities such as Clinicals, Co-ops, Educational Work Experience (EWE). Details that you can maintain include placement setting, fees, duration, time in attendance, and grading. Through Superior Structure setup, you can maintain relationships between unit section and set up default enrollment into the subordinate unit sections.

Class Standing

You can now consider class standing when assigning waitlist priority and preferences and reserve seating priority and preferences.

Inheritance

In this release, data set up for units does not need to be set up again for unit sections. However, you can override unit setup by changing the details for unit sections.

Integration Enhancements

Enhancements support the calculation of audit and special fees in Student Finance. Waitlist functionality is enhanced to limit the number of waitlists a student can have and to follow rules setup for your institution rather than for each organizational unit.

2.4 Admissions

New Admissions features allow you to track receipt of unofficial transcripts and further integrate with Financial Aid.

Tracking

This release allows you to require and track receipt of unofficial transcripts as well as official transcripts.

Financial Aid Integration

Through new business events, the Financial Aid Office is notified when changes are made to a set of information that includes the outcome status, and academic index.

Trading Community Architecture Enhancements

There are new columns in the HZ Education table that can be used to promote better sharing of academic information with other applications: School Party ID, Object Version Number, Application ID, and Created By Module.

2.5 Enrollment

Enrollment enhancements include preventing students from dropping core units and restricting searches in self-service.

Prevention of Dropping Core Units

In this release, a core drop validation prevents a student from dropping a core unit attempt from the cart or schedule.

Core and Optional Enrollment Enhancement

You can now determine whether the student can search only for units defined in the pattern of study or search without restriction.

Notifications

In this release, you can notify students when certain events occur during the enrollment and research processes.

Waitlist Enhancements

The priorities and preferences set up can now be enforced during waitlisting.

Bulk Unit Attempt Upload

An interface is provided to allow the quick upload of unconfirmed and confirmed unit attempts.

Placement

You can enter details for work-experience unit attempts.

Self-Service Schedule

The Year of Program can be seen in the schedule, when the year of program is being used.

Term Records

Program attempt attributes can be stored by term.

2.6 Records

Records functionality is enhanced to allow derivation of student unit attempt outcome from student unit assessment item outcomes and summarize achievements into honors categories.

Basic Grade Book

The current release of Oracle Student System facilitates derivation of student unit attempt outcomes from student assessment item outcome. This functionality has been achieved by replacing the assessment patterns with the new concept of assessment item groups.

Through the use of assessment item groups, users have the ability to define mark derivation attributes, for midterm and/or final grading period, for any assessment items associated with a unit or unit section. You can customize the inherited mark/grade derivation attributes for any student unit attempt. Additionally, you can manually overwrite the system derived student unit attempt outcomes mark and grade.

Furthermore, you can restrict faculty from finalizing the student unit attempt outcome and only allow administrators to perform the final step of the grade finalization process.

You can now assign a default date and time for release of student unit attempt outcome by using the Release Unit Section Grades to Students concurrent process and the respective self-service page.

Students will now be able to easily obtain details of their respective unit attempt and assessment item through a new self-service page called View Grade Details.

Tracking

You also can track student placement experiences.

UK - Summary Measures of Attainment

In this release, you can calculate Unit Level Marks that can then be used to summarize student achievements into honors categories such as First Class or Upper Second Class.

In this release, you can summarize student achievements into honors categories such as First Class and Upper Second Class and calculate Weighted Average Mark either through Oracle Student System or through a third party application using an interface.

2.7 Student Finance

In this release, you can define payment plans and include unit sets when you set up rates.

Payment Plans

You can now define payment plans, assign and maintain student payment plans, and record installment payments.

Unit Sets in Rate Table

In this release, unit sets can be a variable in the establishment of rates.

Audit and Special Fees

Unit and unit sections can be set up as auditable so that you can charge students for audited units or units sections depending on your business practices. You can charge students for regular tuition or for an audit fee instead of regular tuition.

Special fees can be defined at the unit section level to be charged to all students enrolled in that unit section.

2.8 Financial Aid

In addition to yearly federal updates, Financial Aid features have been expanded.

College Board Institutional Methodology

You can use College Board Institutional Methodology as a selection in awarding setup.

Multiple Financial Aid Offices

You can use multiple reporting identifiers based on different reporting entities within a school when processing with the external agencies such as CPS, COD, and FFELP lenders.

Yearly Updates

Expected Family Contribution Calculation is enhanced to meet US Department of Education need analysis standards for 2004-2005. Statutory and regulatory changes are made for ISIR, PROFILE, Federal Pell Grant, and Federal Direct Loan programs for 2004-2005.

Pell Grant / Direct Loan Updates

In this release, you can calculate a Pell cost of attendance for students attending less than half time. You can also award and process Pell Grant awards for Pell Formulas 2 and 3 in addition to Pell Formula 1.

Verification Enhancements

Verification worksheet is redesigned in HTML and more tightly integrated with ISIR records.

Loan Enhancements

Lender Relationship setup is enhanced and the ability to assign and preferred Lender to a borrower added.

Awarding Enhancements

In this release, the requirement for an ISIR to be present in order to award is relaxed. Distribution of funds across while awarding is moved from Fund Manager to a new, more flexible setup. Cost of Attendance assignment is enhanced to allow updates.

2.9 HESA

In this release, you can override MSFUND for program offering options and use seeded organizational ID types to identify previous institution codes.

Override MSFUND for Program Offering Option

You can now capture the funding source restriction for program offering options, and override the funding source restriction captured for programs.

Cost Centre Subject Code Apportioning for Program

You can now capture the cost centre subject code proportions for programs which have the same split for each year of program.

Organizational Structure System Alternate Identifiers

In this release, the HESA extraction process is enhanced to use seeded system organizational id types to identify the previous institution code to be reported to HESA.

Integration with Modified Program Completion

The HESA code mapping that maps the Oracle Student System award and honors level to the HESA Classification codes has been obsoleted and is replaced by a mapping between the Oracle Student System award and grade to the HESA Classification codes.

Introduction

3.1 The Oracle E-Business Suite

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

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

- Oracle 9i
- Oracle 9i Application Server
- Common Services and Components
- Oracle Internet Business Intelligence: Insight for Everyone

Oracle 9i Database

All applications reside on the Oracle9i Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications (OLTP), query-intensive data warehouses, and high capacity web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise providing consistent information over multiple channels.

Oracle 9i Application Server

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

Common Services and Components

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

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

Oracle Internet Business Intelligence: Insight for Everyone

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

3.1.1 The Applications in the Oracle E-Business Suite

Customers can seamlessly share data from front-end applications to back-end applications. The front-end applications include:

- Oracle Marketing
- Oracle Sales
- Oracle Contracts
- Oracle Service
- Oracle e-Commerce Gateway

The back-end applications include:

- Oracle Order Management

- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management Systems

Customer Relation Management

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

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

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

- The Contracts suite enables authoring, executing and managing contracts, warranties and extended warranties which provides visibility to contract entitlements and proactively acting upon contractual commitments. Whether a buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.
- The Service suite manages service activities with the goals of profitability, employee productivity and complete customer satisfaction by addressing all service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

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

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

Enterprise Resource Planning

Use the applications to control their back-office operations. For example:

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

Oracle Common Application Components

Oracle Common Application Components includes functionality that supports all applications. For example, Oracle Trading Community Architecture consists of a database schema and Application Programming Interfaces (APIs) where you can model the complex relationships that occur within a business community and enter that data consistently throughout the enterprise. Because the model is not

hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation. Oracle Trading Community Architecture delivers a 360-degree view of the customer.

3.2 Oracle Student System Implementation Overview

Oracle Student System is part of a suite of software subsystems that provides educational institutions with an integrated student information management system.

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

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

The implementation of Oracle Student System begins with the subsystems that support functionality across multiple Oracle Student System subsystems. These system wide subsystems include:

- Person
- Calendar
- Organizational Structure
- Tracking

The remaining subsystems are completed in the following order:

- Program Structure and Planning
- Student Recruiting including implementation of related subsystems and Inquiry
- Admissions
- Enrollment
- Academic Records, which includes Academic Statistics, Progression, Student Assessments, Graduation, and Order Documents
- Student Finance
- Research
- Financial Aid

- United Kingdom

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 windows that define related functionality. Functionality that is not needed does not need to be set up.

This guide is organized in order of implementation. The chapters containing setup procedures are presented in the order of setup, as are the procedures within the chapters. For the overall setup process for each of the subsystems, detailed flows diagrams can be downloaded from *OracleMetaLink*.

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

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

Before You Begin

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

- Related Documentation

4.1 Related Documentation

4.1.1 Online Documentation

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

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

4.1.2 Related User Guides

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

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

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

4.1.3 Guides Related to This Product

Review the guides related to Oracle Student System.

4.1.3.1 Oracle Student System User Guide

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

4.1.3.2 Oracle Student System for the United Kingdom User Guide

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

4.1.3.3 Oracle Student System Open Interfaces Guide

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

- Import data into Oracle Student System
- Transfer data within Oracle Student System
- Export data from Oracle Student System to another Oracle application or third party software and import the processed data into Oracle Student System

Other Oracle Applications and Tools

5.1 Users

Create new users to grant access to Oracle Student System or assign access to existing users in Oracle Student System in the User window.

To create new users, see *Oracle Applications System Administrator's Guide*.

The Person User Name Batch Creation concurrent process creates FND user accounts in bulk. See Appendix E, "Implementation Concurrent Processes" for more information.

5.2 Application Security

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

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

- Application database privileges
- An application's functionality that is accessible
- The concurrent processes and reports that are available

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

All Oracle Applications users access the system through a responsibility that is linked to a security group and a security profile. The security group determines which business group the user can access. The security profile determines which records the user can access within the business group.

There are two types of security profiles:

- Unrestricted
- Restricted

A responsibility with an unrestricted security profile has unrestricted access to data in the Oracle Student System tables. It connects to the APPS Oracle User. If you connect to an unrestricted security profile, the data you see when you select from a secure view is that same data you see if you select from the table on which the secure view is based.

When you connect to the APPS Oracle User with a restricted security profile, you access the secure tables directly if you want to bypass the security restrictions defined in your security profile. You might want to do this to perform uniqueness checks or to resolve foreign keys.

Restricted security profiles can optionally make use of read-only, or reporting users. These are separate Oracle Users, one per restricted security profile, that have read-only access to Oracle tables and views. Reporting users do not have execute privileges on Oracle Student System PL/SQL packages and do not have direct access to the secured Oracle Student System tables.

For additional information, see *Oracle Applications System Administrator's Guide*.

5.2.1 Security Overview

Oracle Student System provides a security framework through Self-Service that allows users to control access to data. The security framework defined applies to the Admission application data.

The **OSS Security Officer** responsibility (IGS_SC_ADMIN) allows a user to access the Security framework defined.

Note: The security framework defined applies to Admissions application data.

5.2.2 Security Framework

The Business Objects screen is the homepage for Security Administrators. Business object data displays in table format on this page, with icons to click for more detailed information about attributes, tables, and Grants.

The Security Framework defined for each module's application data consists of the following:

- **Business Objects:** Business Objects in Oracle Student System Security refer to the components of a particular part of functionality. For example, the Business Object *Application* is the group of objects representing a student's application. Business objects need to have a security policy associated with them. If you have the same security policy for different component tables, then most likely they are the same business object. If, however, you have a different security policy in the same business object then they are usually different objects.
- **Business Objects Attributes:** Security attributes can be derived for each component table and define the security on the row of data. All security access policies are based on the defined attributes.
- **Business Object Component Tables:** Tables for each business object that comprises a part of the module's data and functionality.
- **Security Grants:** Authorization for the grantee to perform an action on a specified object that has been identified. Grants combine groups of users and their attributes with objects and the corresponding attributes for those objects.
- **User Attributes:** User Attributes define the values to be used in security access policies for a particular user.
- **Access Roles:** Group of users (FND_USERS).
- **Access Role Assignments:** Assigned access role.

5.2.2.1 Business Objects

Business objects are the entities that define the set of component tables. These make up the logical part of the functionality. All business objects have an associated security policy.

For example, the Business Objects defined for the Admissions module's application data are:

- **APPLICATION HEADER:** The objects that represent a person's application.
- **APPLICATION INSTANCE:** The object that represents a person's application specific to a program.
- **APPLICATION DETAILS:** The object that represents details of an application and application instance.
- **PROGRAM APPLICATION DETAIL RATINGS:** The object that represents ratings entered by evaluators for a person's application to a specific program.

Use the Business Objects screen to view the data tables for a set of functionality data (For example, all Admissions data stored in the system), along with the Default Grant type for that set. Grant types are:

- **Grant:** Certain actions can be performed on business objects.
- **Restrict:** Only certain actions can be performed within certain security parameters.

5.2.2.2 Business Objects Attributes

The Business Objects Attributes can be derived for each component table and will define the security on the row of data. All security access policies will be based on the defined attributes. For each business object, a list of attributes must be defined.

As a model, for example, the Business Object Attributes for each Business Object, for the Admissions module's application data are defined as follows:

Business Object: APPLICATION HEADER

- **Person ID:** Unique identifier for a person
- **Nominated Course Code:** Code for the program selected for the application
- **Location:** Location for the program offering option selected for the application
- **Responsible Organizational Unit Code:** Organizational unit associated with the program selected for the application
- **School Applying To:** User-defined value mapped to Organizational Units representing the schools within an institution

Business Object: APPLICATION INSTANCE

- **Person ID:** Unique identifier for a person
- **Nominated Course Code:** Code for the program selected for the application
- **Location:** Location for the program offering option selected for the application
- **Responsible Organizational Unit Code:** Organizational unit associated with the program selected for the application
- **School Applying To:** User-defined value mapped to Organizational Units representing the schools within an institution

Business Object: APPLICATION DETAILS

- **Person ID:** Unique identifier for a person

- **Nominated Course Code:** Code for the program selected for the application
- **Location:** Location for the program offering option selected for the application
- **Responsible Organizational Unit Code:** Organizational unit associated with the program selected for the application
- **School Applying To:** User-defined value mapped to Organizational Units representing the schools within an institution

Business Object: PROGRAM APPLICATION DETAILS RATINGS

- **Person ID:** Unique identifier for a person

5.2.2.3 Business Object Component Tables

The Business Object Tables are associated with each Business Object. Only tables listed will have the security policy defined.

The tables in this section list and describe the Business Object Tables for each Business Object, defined for the Admissions module's application data.

The following table lists and describes the Business Object Component Tables for the following:

- Application Header
- Application Instance
- Application Details
- Program Application Detail Ratings

Table 5–1 Business Object Component Tables

Business Object Name	Business Object Component	Description
Application Header	IGS_AD_APPL_ALL	Contains application-level information. This information can apply to multiple program applications.
Application Header	IGS_AD_PS_APPL_ALL	Contains information for application to a specific program.
Application Instance	IGS_AD_PS_APPL_INST_ALL	Contains information for an application instance.

Table 5–1 (Cont.) Business Object Component Tables

Business Object Name	Business Object Component	Description
Application Details	IGS_AD_APP_INTENT	Contains information about an applicant's intent.
Application Details	IGS_AD_ACAD_INTEREST	Contains information about an applicant's academic interests.
Application Details	IGS_AD_SPL_INTERESTS	Contains information about an applicant's special interests.
Application Details	IGS_AD_SPL_TALENTS	Contains information about an applicant's special talents
Application Details	IGS_AD_APP_REQ	Contains information about an application fee requirements
Application Details	IGS_AD_OTHER_INST	Contains information about the other institutions applied for by the applicant
Application Details	IGS_AD_APPL_PERSTAT	Contains information about the personal statement details for the application.
Application Details	IGS_AD_APPL_HIST_ALL	Contains information about application history.
Application Details	IGS_AD_PS_APPL_HIST_ALL	Contains information about an application program details history
Application Details	IGS_AD_UNIT_SETS	Contains information about desired unit sets applied for by an applicant for an application instance.
Application Details	IGS_AD_APPL_NOTES	Contains notes information about an application instance
Application Details	IGS_AD_EDUGOAL	Contains information about post education goals for an application instance
Application Details	IGS_AD_APLINS_ADMREQ	Contains information about admission/post admission requirements for an application instance

Table 5–1 (Cont.) Business Object Component Tables

Business Object Name	Business Object Component	Description
Application Details	IGS_AD_SPL_ADM_CAT	Contains information about special admission categories under which the applicant is admitted/considered
Application Details	IGS_AD_PANEL_DTLS	Contains information about screening/interview panel details for an application instance.
Application Details	IGS_AD_PNMEMBR_DTLS	Contains information about screening/interview panel member details for an application instance.
Application Details	IGS_AD_PNMEMBR_NOTS	Contains information about screening/interview panel notes details for an application instance.
Application Details	IGS_AD_PNL_HIS_DTLS	Contains information about screening/interview panel history details for an application instance.
Application Details	IGS_AD_PS_APLINSTHST	Contains information about an application program instance details history
Application Details	IGS_AD_PS_APLINSTUNT_ALL	Contains information an application instance unit details
Application Details	IGS_AD_PS_APINTUNTHS_ALL	Contains information an application instance unit history details
Program Application Detail Ratings	IGS_AD_APPL_EVAL	This table contains rating evaluation information for an application instance.
Program Application Detail Ratings	IGS_AD_APPL_PGMAPPRV	This table contains program approver information for an application instance.

5.2.2.4 Business Object Component Tables Attributes

The Business Object Component Table Attributes screen displays table attributes and the corresponding SQL statement that has been created for retrieving the

attribute(s) value. This data allows the security administrator to view information on how and why the attribute is retrieved.

5.2.2.5 User Attributes

User attributes define values to be used in the security access policies for the particular user. The statements used are to obtain the attribute value for the current user security attribute.

5.2.2.6 Grants

Grants are actions that can be performed on an object, based on certain conditions. Grants are given to the user groups for a particular business object. Currently, there are only four database operations that can be granted. These are:

- Insert
- Update
- Select
- Delete

The actual grants for each Object are listed below. For each business object the following is listed:

- **Roles:** List all roles associated with the current grant.
- **Grant conditions:** The actual grant conditions for the current grant.
- **Name, Description:** Name of the grant and its corresponding description.

The following table lists the Grant table data for the following Business Object Names:

- Application Header
- Application Instance
- Application Details
- Application Detail Ratings

Table 5–2 Grant Tables

Roles	Function	Grant conditions	Name and Description
Applicant	INSERT, SELECT	OBJ.PERSON_ID = USER.PERSON_ID	Able to insert and select application records (except Ratings information)
Admission Administrator	DELETE, INSERT, SELECT, UPDATE	OBJ.ORG_ID = USER.ORG_ID	Able to delete, insert, select and update application records, including Ratings information
Admission Data Entry	DELETE, INSERT, SELECT, UPDATE	OBJ.ORG_ID = USER.ORG_ID	Able to delete, insert, select and update application records except Ratings information
System Administrator	DELETE, INSERT, SELECT, UPDATE	1=1	Able to delete, insert, select and update application records, including Ratings information

5.2.2.7 Access Roles

Access Roles are used to define different access policies to the business objects. The following Access Roles are seeded. Note that you can add additional access roles as needed.

Applicant: Person applying for admission.

Admission Administrator: Admission office staff member, includes responsibility for setup, maintenance.

Admission Data Entry: Admission office staff member, includes responsibility for data entry, but does not include maintenance.

System Administrator: Staff member responsible for system-wide maintenance

5.2.2.8 Role Assignments

To implement security for individual users, each user has to be assigned an access role. The access role is associated with a security grant.

You cannot assign the same role to the same person more than once.

5.2.3 Defining Oracle Student System Responsibilities

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

1. Under the System Administrator responsibility, create users.
2. For each user, create one or more responsibilities based on the users' roles and responsibilities.

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

3. Create additional responsibilities and associated menus.

The following describes the Oracle Student System seeded responsibilities:

AK Developer: Define regions in Apps to troubleshoot errors

Application Developer: Modify self-service messages and set up descriptive flexfields

System Administrator: Set profile options. Check the status of concurrent processes requests. Add and update menus. Create responsibilities. Create users. Define descriptive flexfields and descriptive flexfield segments. Define key flexfield segments and key flexfield segment values. Define system profile values at the responsibility and site levels. Define values sets. Implement Function Security

Oracle Student System Super User: Create setup values and initiate transactions across all Oracle Student System subsystems. Access forms from root menu.

Financial Aid Super User: Create setup values and initiate transactions for Financial Aid windows only. Access windows from Financial Aid menu only

SEVIS Administrator: Initiate SEVIS reports. View SEVIS reports

OSS Administrator Self Service: Access from Administrator Self Service home page only

OSS Advisor Self Service: Access from Advisor Self Service home page only

OSS Alumni Self Service: Access from Alumni Self Service home page only

OSS Applicant Self Service: Access from Applicant Self Service home page only

OSS Faculty Self Service: Access from Faculty Self Service home page only

OSS Former Student Self Service: Access from Former Student Self Service home page only

OSS Guest Self Service: Access from Guest Self Service home page only

OSS Recruiter Self Service: Access from Recruiter Self Service home page only

OSS Student Self Service: Access from Student Self Service home page only

To create new responsibilities, see *Oracle Applications System Administrator's Guide*.

5.3 Menus

Implement function security for Oracle Student System by excluding functions and menus from a responsibility. The system administrator excludes functions and menus to restrict access for a responsibility.

To implement function security and see information on manually adding concurrent processes to the Navigator menu *Oracle Applications System Administrator's Guide*.

To create menus, see *Oracle Applications User's Guide*.

5.4 Flexfields

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

For United States schools, you can use the Sales Tax Location flexfield in Oracle Receivables to validate addresses.

See *Oracle Applications Flexfields Guide* for more information.

5.5 System Profile Values

Set up system profile values for Oracle Student System.

To define system profile values, see *Oracle Applications System Administrator's Guide*.

5.6 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.

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

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

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

5.6.1 Defining Lookups

Individual setup windows and fields depend on specific lookup types related to that setup window. During Oracle Student System implementation, lookup values are defined as part of the setup procedures for the subsystems.

See Also

See Appendix D, "Oracle Student System Lookups" for detailed information about lookups in Oracle Student System.

For information on Lookups, see *Configuring, Reporting, and System Administration in Oracle HRMS*.

5.7 Profile Options

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

A profile can be set at the following levels:

- **Site.** Use if the profile option applies to all users at your site.
- **Application.** Oracle Student System or Oracle Financial Aid.
- **Responsibility.** Use only if the profile option you are defining is specific to a responsibility.
- **User.** Use only if the profile option you are defining is specific to a user.

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

Most profiles are seeded with default values at the site level, which serve as system defaults until they are overridden at other levels.

See Also

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

5.8 Oracle Portal

Oracle Student System provides three portlets: My Schedule, My Fee, and My Personal Information. These portlets provide easy access to student and administrative information through self-service pages.

Oracle Portal integration is optional.

5.8.1 Setup for Oracle Student System Portlets

When the portal is configured, a Web provider is created. Use the Web provider when you want to add portlets to this portal. The Web provider displays all the portlets under the menu structure attached to his responsibility. You can then add one or more portlets.

Prerequisites

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

Steps

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

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

5.8.1.1 Users and Roles

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

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

5.8.1.2 Home Pages

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

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

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

5.8.1.3 Home Page Templates

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

The following roles have templates available:

- Student
- Faculty
- Administrator/Staff

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

- Current Students
- Prospective Students

5.8.1.4 Home Page Portlets

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

5.9 Oracle Workflow

Oracle Workflow consists of workflows and business events.

Oracle Workflow is also used to call the necessary XML workflow libraries to perform the message compilation, document consumption, and error handling along with the associated notifications.

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

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

See Also

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

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

5.10 Self-Service

User IDs can be created by the System Administrator using the Define Users window. As a part of the user ID creation, users are also assigned a party ID. This is a mandatory setup step.

The party ID is assigned on the Users window using the Customer field. This field has a list of values of parties. The desired party is selected from the list and the user record must be saved with this value.

5.10.1 Setting Up Self Service Person Responsibility

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

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

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

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

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

Multiple records can be entered, deleted, or updated.

Profile Options

There are four profile options for the self service administrative user to set up. The following describes these profile options. These profile options are used for the New User Registration and Person Batch Username concurrent process. Set the following at the Site level:

- IGS: Self Service Administrator
- IGS: Approval Required for Person Creation
- IGS: Generate User Name Automatically
- IGS: Approver of Person Creation

Person Types and Responsibilities

There are several seeded person types in Oracle Student System for self-service. These person types include the following:

- Advisor
- Applicant
- Evaluator
- External Contact
- Faculty
- Former Student
- Graduate
- Other
- Prospect
- Self Service Enrollment Staff
- Staff
- Student
- User Defined

- Exchange Visitor
- Non-Immigrant Student

There are several seeded responsibilities in Oracle Student System for self-service. These responsibilities include the following:

- 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

5.10.2 Personalizing Self-Service Pages

You can customize the display of self-service pages using Oracle Applications Framework.

5.10.3 New User and Forgotten Password Functionality

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

Note: You must add these links again after you install a patch.

5.10.3.1 New User/Forgotten Password Profile Options

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

- **IGS: Self Service Administrator:** Set the profile option at the site level. The value entered must be a self service administrator's user name.
- **IGS: Approval Required for Person Creation:** Set the profile option at the site level. Available values are Yes and No. The default value is Yes.

- **IGS: Approver of Person Creation:** Set the profile option at the site level. The approver may be different than the Self Service administrator. A value is required if IGS: Approval for Person Creation is set to Yes.
- **HZ: Generate Party Number:** Set the profile option at the site level for New User Registration functionality to Yes.
- **IGS: Generate User Name Automatically:** Set the profile option at the site level. If the value is set to No, a user name can be entered in the Self Service Creation page. If the value is set to Yes, a business event is raised and the institution will have to subscribe to a function that creates the user name. The default value is No.

You must also set up Self Service Person Responsibility.

- The Self Service Responsibility tab in the Person Data Setup window in Oracle Student System must be configured with all system person types mapped to a responsibility.

5.10.3.2 Required Hyperlinks and User Definitions

Two links must be added to the login page:

- New Users Register Here
- Forgot Password

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

5.10.4 Self-service Inquiries

After you create a link between your web page and an inquiry self service page, prospective students can submit an inquiry without navigating to Oracle's Personal Home page. This is a quick, easy, and efficient method to submit an online self-service inquiry.

To invoke prospect inquiry self service pages from school's website, create a link for your website on either your home page or on a designated page.

To enable Prospect Inquiry functionality, you must create a user. For example, create a user, **Username**, with a password of **Welcome**. This user (Username) must be assigned only the OSS Guest Self Service responsibility.

Add the following JavaScript function and HTML code to your web page from where a prospect inquiry self-service page should be launched.


```

<SCRIPT LANGUAGE="JavaScript">
function createSSIquiry()
{
document.Inquiry.i_1.value="[USERNAME] ";
document.Inquiry.i_2.value="[WELCOME] ";
document.Inquiry.URL.value=
"/OA_HTML/OA.jsp?akRegionCode=IGS_AD_INQ_ENTRY_STATUS_
PAGE&akRegionApplicationId=8405"
document.Inquiry.submit();
};
</SCRIPT>

<A HREF="javascript:createSSIquiry()">Prospect Inquiry</A>
<FORM NAME="Inquiry" ACTION="/pls/[INSTANCENAME]/OracleApps.redirectURL"
METHOD="POST" TARGET="_top">
<INPUT TYPE="hidden" NAME="i_1" VALUE="">
<INPUT TYPE="hidden" NAME="i_2" VALUE="">
<INPUT TYPE="hidden" NAME="URL" VALUE="">
</FORM>

```

You must change the values in the code provided to actual values:

- [USERNAME]: Actual user name you create
- [WELCOME]: Actual password of the user that you create
- [INSTANCENAME]: Actual database instance name that you are using
- *Prospect Inquiry*: Text of the link
- “Prospect Inquiry” to new text.

Note: If you are using a Quick Apache server, then the HTML page should be located in the \$OA_HTML folder. If you are using other web servers, this web page can be located in suitable folder.

It is your responsibility to resolve all firewall related issues.

5.11 Oracle Student System Administrative Responsibilities

Oracle Student System Administrative Self-service functionality is accessed by users granted the following seeded responsibilities:

- OSS Administrative Admission Self Service
- OSS Administrative Recruiter Self Service

- OSS Registrar: Student Support Self Service
- OSS Registrar: Faculty Support Self Service
- OSS Administrative Advisor Self Service

Users assigned these responsibilities will have access to the different functionalities associated with each responsibility. You can create your own additional responsibilities if desired.

There are two common functionalities across **all** responsibilities:

- Notifications
- Alerts

Note: For functionality that is used indirectly by two or more different responsibilities, the functionality must be marked as hidden and associated to the responsibilities requiring it. For example, viewing a student's academic history is part of the OSS Registrar: Student Support Self Service responsibility. However, users assigned the OSS Administrative Advisor Self Service responsibility will also be able to navigate to view student's academic history through a link in a Self-Service page. In this case, you might not want View Academic History to show up in the main menu for the advisor responsibility, but since the advisor will have the ability to navigate to the page, you must assign View Academic History as a hidden function for the OSS Administrative Advisor Self Service responsibility.

The following table lists and describes the Self-Service Administrative responsibilities.

Table 5–3 Self-Service Administrative Responsibilities

Responsibility	Menu	Description
OSS Administrative Admission Self Service	IGS_SS_ADM_ADMIN	Responsibility for OSS Administrator for Admission related Self Service pages.
OSS Administrative Recruiter Self Service	IGS_SS_RCT_ADMIN_MENU	Responsibility for OSS Administrator for Recruitment related Self Service pages.
OSS Registrar: Student Support Self Service	IGS_SS_REG_STDNT_SUP_MENU	Responsibility for OSS Registrar for student related activities.
OSS Registrar: Faculty Support Self Service	IGS_SS_REG_FAC_SUP_MENU	Responsibility for OSS Registrar for faculty related activities.

Table 5–3 (Cont.) Self-Service Administrative Responsibilities

Responsibility	Menu	Description
OSS Administrative Advisor Self Service	IGS_SS_ADVISING_ADMIN_ MENU	Responsibility for OSS Administrator for advising related activities.

System Wide Services: Person

6.1 Person Overview

Record and maintain 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 Oracle E-Business Suite modules.

The Person subsystem allows you to perform the following tasks:

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

Under certain circumstances, dynamic prompts appear in several Person subsystem windows. The following table describes the dynamic prompts.

Table 6–1 Dynamic Prompts

Dynamic Prompt	Description
Deceased	Person is deceased; conditional field appears to allow user to enter deceased date
Holds Exist	Indicates student has academic hold restricting enrollment in context program; hold details are maintained in Person Hold Details window
Administrative Hold	Indicates applicant has administrative hold restricting access to services provided by institution; hold details are maintained in Person Hold Details window
[Privacy Level]	Indicates level of privacy indicated for this level of data, for example, Level 5 - High; privacy level entered for data group, then data group is assigned to person
[Admission Process Category]	Admission process category of current session details if they differ from admission process category associated with displayed program; program admission process category is used rather than session admission process category
[Override Commencement Period]	Override commencement period of existing application instance that is deferred or requested for reconsideration; asterisk (*) appears next to each overridden application instance; new commencement period appears
[Recorded Preferences]	List of program preferences showing where program application appears in list of applicants expressing preference for same programs, and maximum number of programs they can apply for
Reconsideration	Indicates program application has Request For Reconsideration check box selected, and it must be included in new admission period
[New Admission Period]	Date when application flagged for reconsideration is included in admission period, for example, 2004/2
Student Program Attempt	After preenrollment for a program application, indicates unconfirmed or inactive student program attempt exists
[Person ID Type]	If person type is assigned in which Preferred check box is selected, person ID type appears in each window in which person number appears; can be used as alternative way of identifying person
[Active or Inactive Oracle User name]	Appears in Person Query window to indicate whether person is active or inactive user

Table 6–1 (Cont.) Dynamic Prompts

Dynamic Prompt	Description
[Load Calendar Name and Dates]	<p>Appears in Student Program Attempt window if student is enrolled in program; load calendar used to derive current attendance mode and type; for example, Load-Cal-1 01-JAN-2004 30-JUN-2004</p> <p>Note: A student's derived attendance mode and type can differ from the attendance mode and type of the program offered to the student which appears in the Person Query window.</p>
[Lamp]	Appears when a merged or obsoleted person record is retrieved and for inactive records

6.2 Person Profile Options

Set up the following Person profile options.

- **HZ: Generate Party Number:** Set to generate unique identifier for person IDs and organizational unit IDs
- **IGS: Address Type for Residence:** Set address type
- **IGS: Approver of Person Creation:** Set approvers for person creation
- **IGS: Approval Required for Person Creation:** Set whether approval is required for person creation
- **IGS: Citizenship Residence Status:** Set default citizenship or residency status as defined in person statistics code citizenship status
- **IGS: Country of Citizenship:** Set country of citizenship
- **IGS: Decides Whether Religion Tab Has to be Displayed:** Set to display Religion tab
- **IGS: Duplicate Match Criteria:** Set match criteria to check for duplicate person records during manual data entry
- **IGS: Family Address Usage:** Set address usage for Family Addresses window
- **IGS: Family Age Auto Population:** Set family age auto population to set age in the Person Relationships window
- **IGS: Generate User Name Automatically:** Set to generate user name automatically
- **IGS: Language Code:** Set language code

- **IGS: Number of Days Since Last Verification:** Set the number of days since last user information verification in self-service
- **IGS: Person Matriculation Term:** Set person matriculation term
- **IGS: Path of file where export data will be stored:** Set path of file where export data will be stored
- **IGS: Person Catalog:** Set person catalog
- **IGS: Person Most Recent Admittance Term:** Set person most recent admittance term
- **IGS: Person Query Address Usage:** Set to person address
- **IGS: Residency Class:** Set residency class
- **IGS: Printer Destination Name:** Set destination name used by delivery method type
- **IGS: SEVIS Debug Option:** Set to produce report of all errors in the IGS: SEVIS Exchange Visitor Batch concurrent process and IGS: SEVIS Non-Immigrant Batch Process concurrent process to assist DBAs or system administrators with debugging
- **IGS: Student and Exchange Visitor Information System Enabled:** Set to indicate if SEVIS functionality is enabled at your institution
- **IGS: Student Information Verify Mode:** Set to prompt student self-service users to verify information
- **IGS: Self Service Administrator:** Set self-service administrator information
- **IGS: Workflow Enable:** Set to enable Workflow

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see *Oracle Applications User's Guide*.

6.3 Person Lookups

Person lookup codes must be defined to be available throughout the Person windows lists of values.

Navigation

Setups > Lookups

Query the lookup type.

Additional Notes and Business Rules

In the Type field, enter a lookup from the following list and enter user-defined codes for each lookup. Some of these lookups are user-defined and some are extensible. The terms in parentheses are examples:

- PE_ALIAS_TYPE - Alias name (Maiden, Stage, Assumed, And Alternative Names) to indicate if person has used additional names
- PERSON_ID_TYPE - Alternative person ID (Driver's License, Social Security Number) to identify a person. It can be used just for informational purposes, but can be used as identification for processing.
- IGS_ETHNIC_ORIGIN - Ethnic origin (Hispanic) to identify person ethnic origin
- PE_RACE - Race (African American, American Indian, Asian, Hawaiian) to identify person races
- PE_RELIGION - Religion (Catholic) to identify person religions
- PE_RES_CLASS - Residency class (Resident, Non-resident, County, District, State) to determine fee assessment
- PE_RES_STATUS - Residency status (Final Review, Pending, Appeal By Student) to determine fee assessment
- PE_CITI_STATUS - Citizenship status (Citizen, Permanent Resident, Temporary Resident, Resident Of Another Country)
- PERSON_INTERNATIONAL_DETAILS - Details for international students (Citizenship, Fund, Party Relation) to gather data for reporting
- PE_INS_TYPE - Insurance type (Health, Automobile) to indicate types of insurance held by person
- PE_IMM_STATUS - Immunization status (Pending Confirmation, Confirmed, Documented, Not Documented) to indicate immunization status of person
- PE_MIL_SEV_TYPE - Military service type (Army, Navy, Air Force) to identify branch of service
- VETERAN_STATUS - Veteran status (Veteran, Not A Veteran, Dependant Of A Veteran) indicate person retired military status

- PE_MIL_ASS_STATUS - Military assistance status (Active, Expired, Not Applicable, Veteran) to indicate if persons are receiving financial assistance from the government for military service
- PE_MIL_ASS_TYPE - Military assistance type (Medical, Reserve Corps, Scholarship) to indicate type of assistance persons receive
- PE_MIL_SEP_TYPE - Military separation type (Honorable, Dishonorable) to indicate person discharge from military service
- PE_SN_SERVICE - Special need service (Shuttle Service, Wheelchair) to indicate the person disability service needs
- PE_SN_ADD_SUP_LVL - Special need additional support level (Reader For Examinations, Class And Lab Aide, Class Note Taker, Tutor For Reading) to indicate types of additional support needed by persons
- PE_SN_ALLOW - Special need allowance (Extra Time For Examinations) to indicate types of assistance given to persons with special needs
- PERSON_PRIVACY_RELEASE - Privacy release (All, Nothing, Selective) to indicate person privacy levels
- PE_ACAD_HONORS - Academic honors (Dean's List, National Merit List, Valedictorian, Phi Beta Kappa) to indicate honors earned by persons
- PE_ATH_PRG_TYPE - Athletic program type (Basketball, Football) to indicate athletic sports in which persons participate
- PE_PRE_ELIG_TYPE - Predicted eligibility (Eligible) to indicate eligibility status for athletic programs
- PE_ATH_ELG_STATUS - Eligibility status (Immediate Eligibility) to indicate person actual eligibility status for athletic programs
- PE_TENTATIVE_ADM_TYPE - Tentative admission type (Part-time) to indicate predicted admission types
- PE_CRE_RATING - Credential Rating
- PE_EXT_REF
- PE_EMP_CATEGORIES
- PE_FUND_TYPE
- PE_FUR_EDU
- PE_IMM_TYPE

- PE_NOTE_TYPE
- PE_SOCECO_STATUS
- PE_TEA_PER_RES
- CITIZENSHIP_DOC_TYPE
- INTERESTS

6.4 Person Data

Person data is information you enter about people.

6.4.1 Setting Up Person Data IGSPE052

Set up all person data information.

6.4.1.1 Setting Up Person Types

A person type is a user-defined classification of persons. You create and map user-defined person types to system person types. Each user-defined person type must be mapped to a system person type.

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

Other is a kind of an undefined type of person. When you first enter information in Person Details, you do not know what type of person this is. You can assign person types to this person at this point, or some person types are only assigned by the system (like Applicant, student).

The Admission Import concurrent process can set the person type to **Applicant** if all information imported.

The following are system person types.

- **Prospect:** Person making inquiries
- **Applicant:** Person applying for admission
- **Student:** Person enrolled
- **Former Student:** Person withdrawing from an institution prior to course completion

- **Graduate:** Person completing course program from an institution
- **Faculty:** Persons teaching at the institution
- **Staff:** Employees or contacts of an institution
- **Advisor:** Person conducting student counselling
- **Self-Service Enrollment:** Person enrolled through Student System's self-service interface
- **User-Defined:** Person type specified by institutional users
- **External Contact:** Contact outside the local institution
- **Other:** Default, undefined type of person. Only used in Person Details.
- **Interviewer:** Person who can interview or screen an application instance
- **Evaluator:** Person who can rate or evaluate an application instance
- **Exchange Visitor:** For SEVIS, international person in US as an Exchange Visitor
- **Nonimmigrant Student:** For SEVIS, international person in US as a Nonimmigrant Student

Prerequisites

FND responsibilities are set up.

Navigation

Person Reference > Setup > Person Data Setup > Person Type

Additional Notes and Business Rules

Mapping: A system person type must be mapped to a user-defined person type. A user-defined person type can correspond to more than one system person type.

Deletion: A person type cannot be deleted.

6.4.1.2 Setting Up Person ID Types

Create the required personal identification types for students.

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

For example, a person who is both a student and a staff member has a student identification number and a staff number. The staff number is entered as alternative person identification.

Each person ID type permits an additional code to be entered against a person record to enable another way of uniquely identifying such data. The alternative identifier is an instance of a person ID type and value when associated with a record.

Alternate Person ID Types

An alternate person ID is a code by which a person is recognized by other systems or organizations. Examples include government numbers, staff numbers, student identification numbers issued by other organizations, and employee numbers.

An alternate person ID entered for a person identification type is a payment advice number used in the Student Finance subsystem to identify students when fee payments are received through a bank. The system generates a unique number for the first time when a person payment schedule is created for a student and displays the same in the Alternate Person IDs window. The system retains this number and includes it in the account statements or exports it for use in an external finance system.

Each alternate person ID is assigned an identification type that identifies the system or organization to which the alternate person ID belongs. When a record is saved, the system confirms whether the Unique check box in the Person ID Types window is selected for the specified person identification type. If the Unique check box is selected and another person with the same alternate identifier exists in the system, the system issues a message. You cannot continue to apply this alternate person identifier until the information is reconciled.

Note: For Financial Aid, you must set up an alternate ID of Social Security number. For example, an institution can set up its preferred alternate id as Driver's License. For Financial Aid purposes, you must create an alternate id of type SSN and associate the person's Social Security number to it. In this case student is going to have two IDs: one DL and other one SSN.

Prerequisites

FND Responsibilities are set up.

Navigation

Person Reference > Setup > Person Data Setup > Person ID Type

Additional Notes and Business Rules

System institution codes: System institution codes can be assigned to students who have identification codes from another system or organization.

Preferred: If selected, then person identification type is the preferred person identification type for the institution. Select this check box for one person identification type only. When you select this check box, Oracle Student System searches for duplication in other records. If the check box is selected in another record, you cannot select this check box.

Unique: If is selected, then two persons cannot have the same alternate person identification for the specified identification type.

Duplicate records: Oracle Student System checks existing duplicate records. If duplicate records exist, the system issues a message.

Format Mask: Format Mask is Person ID type format in hyphenated numeric or alphanumeric characters. After you set a format for a particular Person ID Type, and data has been entered with that format, then you can not update the Format Mask. This format appears on all windows in Oracle Student System that display that Person ID Type.

6.4.1.3 Defining Alternate Person ID Types for UK Functionality

The reference number assigned to the student by the Student Loan Company should be defined with the type **Student Loan Company ID** (UK only).

The UCAS and HESA subsystems require that the following alternate person id types are defined:

- **UCASID:** Holds the UCAS applicant number
- **HUSID:** Holds the HESA student identifier
- **UCASREGNO:** Holds the Scottish Candidate number (SCOTVEC number)
- **TEACHREF:** Holds the Teacher Reference Number, required if the institution reports Teacher Training Students to HESA.
- **DH REG REF:** Holds the Department of Health regulatory body registration number, required if the institution reports health and social care students to HESA
- **NMASID:** Holds the NMAS application number, required if the institution receives NMAS applications from UCAS

- **SWASID:** Holds the SWAS application number, required if the institution receives SWAS applications from UCAS
- **GTTRID:** Holds the GTTR application number, required if the institution receives GTTR applications from UCAS

In addition if you process NMAS applications, you must define an alternate person ID type to hold the National Insurance number. There are no restrictions on the type identifier, the system person id type should be set to **Other**.

Navigation

Person Reference > Setup > Person Data Setup > Person ID Type

Additional Notes and Business Rules

Student Loan Company ID: Define a student loans company identity person ID type with system type Student Loan Company ID.

6.4.1.4 Setting Up Mandatory Data by Person Type

Indicate which data elements are mandatory or preferred by person type.

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

For a person type that is mapped to the system type Other, fields cannot be defined. If a data element is mandatory and the user makes it null, an error message appears and data must be entered. If a data element is preferred and the user makes it null, a message appears, but it can remain null. If a data element is neither mandatory nor preferred, no message appears and it can remain null.

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

Prerequisites

Person types are set up.

Navigation

Person Reference > Setup > Person Data Setup > Mandatory Data

6.4.1.5 Setting Up Private Data Groups

Private data groups are user-defined groupings of different types of privacy information. You can then assign one of these groups to individual persons. The data groups are associated in levels 1 through 5, ranging from low to high privacy levels.

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

You take sole responsibility of information that is released.

Navigation

Person Reference > Setup > Person Data Setup > Private Data Group

6.4.1.6 Setting Up Self-Service Person Responsibility

Use the Self Service Person Responsibility tab on the Person Data Setup window to set up the link between the system seeded person type and the institution's defined responsibilities.

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

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

Each system seeded person type may be linked to more than one responsibility but must be linked to at least one responsibility. For example, you can create a link between the system person type of Advisor to the responsibility OSS Advisor Self Service, or you can create a user in system administrator and assign the OSS Advisor Self Service responsibility to the user.

Multiple records can be entered, deleted, or updated.

Navigation

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

Additional Notes and Business Rules

Responsibilities: Only responsibilities that have been indicated as available from Oracle Self Service Web Application are displayed. These responsibilities are created by your system administrator.

6.4.1.7 Setting Up Special Need Types

UK Note: Define Special Need Types that can be used to record the disability information as received from UCAS and reported to HESA. The types used do not have to have the same values as the standard UCAS and HESA codes.

Special needs codes must be mapped to UCAS and HESA disability codes:

- **UCAS Codes:** Codes imported from UCAS and can be seen in UCAS Interface> UCAS Maintenance> Monitor Reference Data> Disability Codes Tab. Applicants imported from UCAS have a UCAS disability code included as part of their data.
- **HESA Codes:** Codes specified by HESA and are manually entered at HESA Returns> HESA Setup> Maintain Codes using code type HESA_DIS. When reporting to HESA these codes must be used to describe the disabilities of students.
- **Oracle Student System Codes:** User-defined codes used to identify special needs within Oracle Student System.

To allow correct specification of disabilities for applicants imported from UCAS, and to allow correct reporting to HESA, these three sets of codes are mapped to allow code conversion by the UCAS and HESA processes. These mappings are manually entered at HESA Returns > HESA Setup > Maintain Code Mappings for the Association Code **UC_OSS_HE_DIS_ASSOC**.

Navigation

Person Reference > Setup > Person Data Setup > Special Need Types

Additional Notes and Business Rules

Government special need types: Government special need types include Hearing, Mobility, Medical, Learning, Vision, Other, and None.

6.4.1.8 Oracle Human Resource Management Systems Person Types

Oracle Applications Human Resource Management Systems has user-defined setup for person types. Oracle Human Resource Management Systems user-defined person types must be mapped to one of three system defined person types.

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

which all three user-defined values are mapped to the system person type of Employee.

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

The two sets of person types in Oracle Student System and Oracle Human Resource Management Systems must be mapped so that changes and person type creation in Oracle Human Resource Management Systems are also reflected in Oracle Student System.

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

A mapped Oracle Human Resource Management Systems and Oracle Student System person type cannot be end dated, closed, or inactivated in Oracle Student System. An end date may only be entered through Oracle Human Resource Management Systems. Person types in Oracle Student System normally have end dates that you can enter directly. However, if you have completed the mapping, you can only end date the person type in Oracle Human Resource Management Systems, which will then be reflected in Oracle Student System.

Normally you can manually assign the Oracle Student System person type of **Faculty** or **Staff** to persons in Oracle Student System. If you have the person type mapping completed, you can only assign the person types through Oracle Human Resource Management Systems. This reflects in Oracle Student System. Oracle Human Resource Management Systems is in control of these assignments.

Note: If a person type is closed in Oracle Human Resource Management Systems and a person has that person type assigned and mapped in Oracle Student System, then the person type will be end dated for the person in Oracle Student System. If a person type is closed in Oracle Human Resource Management Systems after the mapping in Oracle Student System, then you must update the HR Person Type Mapping tab on the Person Type Mapping window.

Prerequisites

Oracle Human Resource Management Systems is installed.

Person types in Oracle Human Resource Management Systems are established.

Navigation

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

Additional Notes and Business Rules

Person Type: This field is mapped to system person type of **Faculty** and **Staff**.

Human Resources Person Type: Human Resources Person Type is a Oracle Human Resource Management Systems user-defined person type.

Table values: Valid values are active values in the PER_PERSON_TYPES table and must be a system person type of Employee.

Mapping: Multiple Oracle Human Resource Management Systems person types can be assigned to one Oracle Student System person type. An Oracle Student System person type can be mapped to one or more Oracle Human Resource Management Systems person types. When an Oracle Human Resource Management Systems person type has been mapped to an Oracle Student System person type, it cannot be mapped to another Oracle Student System person type.

Multiple values: Oracle Human Resource Management Systems person types can have multiple values for the system person type of Employee. For example, Staff, Faculty, and Administrator can each be mapped to the system person type of Employee. They should have a two different user-defined person types defined in Oracle Human Resource Management Systems for system type **Employee**. Map one to Oracle Student System Faculty and one to map to Oracle Student System **Staff**.

6.4.1.9 Assigning Dates to Person Types

For each person type, you must enter the length of time that person type applies to each specific individual.

The Person Type window displays only:

- Oracle Student System assigned person types
- Oracle Human Resource Management Systems mapped person types if Oracle Human Resource Management Systems is installed

Prerequisites

Oracle Human Resource Management Systems is installed.

Person types in Oracle Human Resource Management Systems are established.

Oracle Student System and Oracle Human Resource Management Systems person type mapping is established.

Navigation

Person Reference > Details > Person Types

Additional Notes and Business Rules

Person Type: A person must have the person type of **Staff** or **Faculty** to perform some actions.

Validation: The following table shows windows and concurrent processes that validate the person type of Staff or Faculty.

Table 6–2 Oracle Student System Validations

Window Name or Concurrent Process	Field	Staff / Faculty Validation
Person Hold Details	Hold Authorizer	Staff
Venues	Coordinator	Staff
Assessment Items	Person ID	Staff/Faculty
Set Person ID Group Hold	Hold Authorizer	Staff
Release of Person ID Group	Hold Authorizer	Staff
Process Application of Finance Holds	Hold Authorizer	Staff
Advanced Standing Details	Authorized By	Staff
Degree Audit/Transfer Request Configuration	Person Type	List of values of person type
Research Supervisor	Person Number	Warns for different person types, including Staff. Does not restrict entry, but must recognize different person types.
Research Supervisor	Supervisor Type	If staff entered in this field, Funding Percentage field is required and Organizational Unit field value must be local
Intermission	Approved by	List of values has only staff members

6.5 Responsibility

Set up windows to be display only or hide tabs from certain responsibilities. It is also used to configure buttons on the Person Details window for responsibilities.

6.5.1 Setting Up Form Configuration IGSPE050

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

CAUTION: You must not use special characters for button labels. You must use only alphabetical characters for button labels.

Prerequisites

FND responsibilities are set up.

Navigation

Person Reference > Setup > Form Configuration

Additional Notes and Business Rules

Copy: This button allows you to copy a certain responsibility's access and navigation to another responsibility.

Form: Person Details is the only available windows in this field. The values for this field are seeded in the **GE_NAV_FORM** lookup. You configure the appearance and order of the buttons (sub windows) for Person Details. The **GE_NAV_FORM** lookup includes only Person Details. This is for the Navigation tab. The **GE_NAV_SUBFORM** is the lookup that lists all Person Details sub windows that can be selected for buttons and labels.

Seq: Use only positive numeric text for the **Seq** field to describe the sequence of buttons, left to right on Person Details window.

Sub Form: Child window to be called on the Person Details windows. The values for this field are seeded in the **GE_NAV_SUBFORM** lookup.

Label: Label for button to be used on Person Details.

Form: List of sub forms to create access rules.

Query Only: This check box determines if sub window is query only.

Tab Page: Allows you to select from valid list of tab regions of sub window to create access rules.

Query Only: This radio button determines if tab region is query only.

Hide: This radio button determines if tab region hidden.

Selection: Each record can be either Query Only or Hide. You select one radio button or the other. If neither is selected, then the responsibility has full access to the tab.

6.6 Matching Criteria

Duplicate Person functionality determines exact or partial matches against existing people in Oracle Student System during manual data entry or through the admission import process.

You can enter match criteria sets to determine matches based on user-identified criteria. This criteria is set up in the Match Criteria Sets window.

If you enter a person during data entry that matches the duplicate match criteria set, you are automatically taken to the Duplicate Person Details window, where you must decide if a record is a duplicate or should be created as a new record.

6.6.1 Setting Up Source Types IGSPE021

Source Types are used to identify the source of data that is imported or manually entered. A source type is user-defined and mapped to a system source type. The system source type identifies the type of data imported or entered.

The system source types are Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts, and Manual.

RECOMMENDATION: Do not setup the funnel status and person type for the source type whose system source type is **Self Service Web Inquiry**.

Prerequisites

Admission categories are set up.

Application detail codes are set up.

Navigation

Person Reference > Setup > Source Types

Additional Notes and Business Rules

UK Note: The following source types must be defined if UCAS applications are going to be processed:

- **Source Type:** System source type

- **UCAS APPL:** Application
- **UCAS PER:** Prospect List

6.6.2 Setting Up Match Criteria Sets IGSPE022

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

The match criteria sets can be used for imported data of any source type or for manually entered data. These match criteria sets can be selected during the import admissions data process.

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

Prerequisites

Source types are set up.

Navigation

Person Reference > Setup > Match Criteria Sets

Additional Notes and Business Rules

Partial If Null: If selected, when any of the data elements included for Exact match is null during the duplicate check, then the duplicate check will skip the exact match and go to the partial match. If the **Partial If Null** is not selected, the **Drop If Null** cannot be selected.

Value: In some cases, the **Value** field is enterable through a list of values, based on the Data Meaning. For example, if the Data Meaning is Person ID Type then the list of value for Person ID Type will be available on the **Value** field.

Exact: If selected, matches criteria set with exact data element.

Drop If Null: If this check box selected, if any of the data elements included for exact match is null, then that data element will be ignored and the exact match duplicate check will not include that data element.

Partial: If selected, Oracle Student System matches partial criteria set with data element. If the **Exact** check box is not selected, the **Partial** check box cannot be selected.

Mutually exclusive: Partial If Null and Drop If Null are mutually exclusive, you can select one or the other.

Primary Address: You can either select **Primary Address** (which means you only check for duplicate records on the primary address) or **Address Type**.

Static Elements

The following table describes seeded data elements that can be used for exact and partial matches.

Table 6–3 Match Criteria Set Data Elements

System Source Type	Data Element	Comments
Manual	Date of Birth	NA
Manual	Given Name	NA
Manual	Given Name -First 1 Character	Default Exact and Partial
Manual	Preferred Alternate ID	None
Manual	Gender	None
Manual	Surname	Default Exact and Partial
Manual	Surname – First 5 Characters	None
Concatenated Address 1-4	Select Concatenated Address 1 through 4 or any of the individual Data Elements, Address Line 1, Address Line 2, Address Line 3, or Address Line 4	Can be used with all source types except Manual
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Address Line 1	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.

Table 6–3 (Cont.) Match Criteria Set Data Elements

System Source Type	Data Element	Comments
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Address Line 2	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Address Line 3	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Address Line 4	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.

Table 6–3 (Cont.) Match Criteria Set Data Elements

System Source Type	Data Element	Comments
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Address Type	<p>Value is list of values of Address Usages.</p> <p>For the defined Address Type value, the value must exist in the interface table, IGS_AD_ADDRUSAGE_INT_ALL.</p> <p>Note: Any of the address related Data Element could be selected as Exact if Address Type is selected as Exact. Similarly address related Data Element could be selected as Partial/DROP IF NULL if Address Type is selected as Partial/DROP IF NULL.</p>
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Date of Birth	None
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	City	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Country	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.

Table 6–3 (Cont.) Match Criteria Set Data Elements

System Source Type	Data Element	Comments
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	County	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Ethnic Origin	None
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Given Name	None
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Given Name – First 1 Character	Default Exact and Partial
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Person ID Type	Value is LOV of User Defined Person ID Types.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Postcode	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Preferred Alternate ID	None
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Province	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.

Table 6–3 (Cont.) Match Criteria Set Data Elements

System Source Type	Data Element	Comments
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Gender	None
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	State	Address Type must be selected as Exact/Partial and Address Type value is defined, or you can select Primary Address instead of Address Type.
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Surname	Default Exact and Partial
Application, Prospect List, Prospect Self Service Web Inquiry, Test Results, Transcripts	Surname – First 5 Characters	None

Exact and Partial Matching

The duplicate matching starts with the exact match by using the selected data elements for exact matching. If the exact match fails, the duplicate matching will then use the partial match with the selected data elements for partial matching. By default all match criteria sets will at minimum include Exact and Partial for the Surname and Given Name – First 1 Character data elements. All other data elements are optional.

UK Note: To process UCAS applications, the data elements defined should include

- Given Name - First 1 Character
- Surname
- Date Of Birth
- Gender

If you only process UCAS applications (NMAS, SWAS and GTTR applications are not processed), the match set criteria can include Person Id Type with value **UCASID**.

Example 1

Data Elements Surname and Given Name – First 1 Character are checked as Exact and Partial

Note: Both these data elements will always be selected by Default for both Exact and Partial.

```
If Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character> then Exact
Match
Else if Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>
  then Partial Match
Else No Match Insert Record
```

Example 2

Data Elements Surname, Given Name – First 1 Character, Date of Birth, and Preferred Alternate Id are checked as Exact and Partial

```
If (Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character>) AND Date of
Birth = <DOB>
AND Preferred Alternate Id = <Preferred Alternate Id>
then Exact Match
Else if (Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>)
AND (1=2 OR Date of Birth = <DOB>
OR Preferred Alternate ID = <Preferred Alternate Id>)
  then Partial Match
Else No Match Insert Record
```

Example 3

Data Elements Surname, Given Name – First 1 Character, Address Type of BILL_TO, Address Line 1, State, and Postcode are checked as Exact and Partial

```
If (Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character>) AND Address
Type = <Address Type of "BILL_TO">
AND Address Line 1 = <Address Line 1>
AND Postcode = <Postcode>
```

```

AND State = <State>
then Exact Match
Else if (Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>)
AND ( 1=2 OR (Postcode = <Postcode> AND
Address Type = <Address Type of "BILL_TO"> AND
Address Line 1 = <Address Line 1>)
OR (Address Line 1 = <Address Line 1>AND
Address Type = <Address Type of "BILL_TO">)
OR (State = <State>AND
Address Line 1 = <Address Line 1>AND
Address Type = <Address Type of "BILL_TO">) )
then Partial Match
Else No Match Insert Record

```

Example 4

Data Elements Surname, Given Name – First 1 Character, Date of Birth, and Person Id Type of Driver's License are checked as Exact and Partial

```

If (Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character>) AND Person
Id Type = <Person Id Type of "Driver's License">
then Exact Match
Else if (Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>)
AND (1=2 OR Date of Birth = <Date of Birth>
OR Person Id Type = <Person Id Type of "Driver's License">) )
then Partial Match
Else No Match Insert Record

```

Match Set Criteria for Address

The following table describes the results of various scenarios based on different Match Criteria Sets for Address. If matches have the same Surname, Given Name 1st character, and some address elements the same, they may be considered as exact or partial.

These address elements are not used for manual sets. These are only used during import. They can be viewed on the Partial Matching Records Review window or the Multiple Exact Matching Records Review window.

Table 6–4 Match Criteria Sets for Address

Data Element	Data in Interface Table	Data in Oracle Student System Production
Surname	Williams	Williams
Given Name	Grace	Gene
Gender	F	F
Address Line 1	10-Beverly Hills	10-Beverly Hills
Address Line 2	5 th Avenue	5 th Avenue
City	Los Angeles	LA
Address Usage	HOME	HOME
Country	US	US

Example 5.1**Match Criteria Set with Different Address Type****Data Elements:**

Given Name - First 1 Character : Exact and Partial selected
 Surname : Exact and Partial selected
 Address Usage : Exact and Partial selected
 Value = BILL_TO
 Address Line 1 : Exact and Partial selected

When executing the Admission Import Process, the interface record will error out with an E001 - No Records found to Import since the Address Type set up in the Match Criteria Set is set to BILL_TO which is different from the interface record of HOME.

Example 5.2**Match Criteria Set with Same Address Type****Data Elements:**

Given Name - First 1 Character : Exact and Partial selected
 Surname : Exact and Partial selected
 Address Usage : Exact and Partial selected
 Value = HOME
 Address Line 1 : Exact and Partial selected
 The above 2 records will return an EXACT Match.

Example 5.3

Match Criteria Set with different cities and exact Address Type.

Data Elements:

Given Name - First 1 Character : Exact and Partial selected
Surname : Exact and Partial selected
Address Usage : Exact and Partial selected
Value = HOME
City : Exact and Partial selected

This will not return an EXACT nor a PARTIAL match. The records in the interface table will be inserted into the production table as a new person.

DROP IF NULL

All the examples are based on the assumption that the selected data elements have been marked for Exact and Partial match in addition have values in the interface table. For data elements, which may contain NULL values in the interface table, the DROP IF NULL should be considered in the match criteria set for a given data element.

If DROP IF NULL is selected and from example 2 if Date of Birth is NULL in the interface table, then the Date of Birth will be dropped from the matching logic.

Example 2 will become:

```
If (Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character>) AND
Preferred Alternate Id = <Preferred Alternate Id>
then Exact Match
Else if (Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>)
AND (1=2 OR Preferred Alternate ID = <Preferred Alternate Id>)
then Partial Match
Else No Match Insert Record
```

If DROP IF NULL is not selected and from example 2 if Date of Birth is NULL in the interface table, then the Date of Birth will be considered as a NULL value. Example 2 will become:

```
If (Surname = <Surname/Last Name> AND
Given Name - First 1 Character = <Given Name - First 1 Character>) AND Date of
Birth IS NULL
AND Preferred Alternate Id = <Preferred Alternate Id>
```



```

then Exact Match
Else if (Surname = <Surname/Last Name> AND
Given Name-First 1 Character = <Given Name - First 1 Character>)
AND (1=2 OR Date of Birth IS NULL
OR Preferred Alternate ID = <Preferred Alternate Id>)
    then Partial Match
Else No Match Insert Record

```

6.7 Holds

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

The system categorizes holds as follows:

- **Academic:** applied when a student's academic performance is poor, for example, for failure to make satisfactory program progress or for failure in a unit. Academic holds can only have academic effects associated with them.
- **Administrative:** applied because a student fails to meet an administrative requirement or requirements, for example, for failure to pay a fee or to return equipment. Administrative holds can only have administrative effects associated with them.

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

A hold has some or all of the following components:

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

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

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

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

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

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

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

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

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

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

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

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

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

- Person Hold Details window
- Person Hold Effects window

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

Student Finance users can also enter financial holds against students.

See *Oracle Student System User Guide* for information about creating and releasing holds.

Security for Applying and Releasing a Hold

Any user who has been granted access to the Person Holds Details window and the Release Person ID Group Holds concurrent process has the ability to release an administrative hold category. Any person who has the same responsibility as the person who applied the hold has the ability to release holds.

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

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

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

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

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

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

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

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

Any user who does not have person information associated to their user account does not have the ability to create a hold in Person Hold Details window and Set Person ID Group Holds concurrent process. You cannot set holds if your user ID does not have your person information associated with it.

6.7.1 Setting Up System Hold Effect Types IGSEN041

Set up the attributes of predefined system hold effect.

Navigation

Person Reference > Holds > System Hold Effect Types

Additional Notes and Business Rules

Level: This field shows a value from 1 to 3 indicating the hierarchy of each hold effect type. The value 3 is the highest.

Apply to Program: If selected, the system hold effect type is applied to an existing program.

6.7.2 Setting Up Person Hold Types IGSEN042

Enter and maintain user-defined hold types and associate them with effect types.

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

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

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

The following are seeded academic hold effects.

EXC_COURSE: Excluded from admission and enrollment in a specific program

EXC_CRS_GP: Excluded from admission and enrollment in a program group

EXC_CRS_U: Excluded from enrollment in unit within a specified program

EXC_CRS_US: Excluded from enrollment in a specific program unit set

RQRD_CRS_U: Enrollment in a specific unit required

RSTR_AT_TY: Enrollment restricted to the specified attendance type

RSTR_GE_CP: Enrollment restricted to greater than or equal to nominated credit point

RSTR_LE_CP: Enrollment restricted to less than or equal to nominated credit point

EX_AWD: Exclude all funds from awarding

EX_DISB: Exclude all funds from disbursement

EX_SP_AWD: Exclude specific funds from awarding

EX_SP_DISB: Exclude specific funds from disbursement

To view all codes and descriptions for these Hold Effects, query the Lookup Type **ENCMB_EFFECT_TYPE**.

The following are administrative hold effects.

C_MTRL_BLK: Mailing of program materials blocked

DENY_EACT: Deny all enrollment activity

GRAD_BLK: Graduation blocked

IDCARD_BLK: Issue of ID card blocked

INFBTH_BLK: Use of information booth blocked

OTHER: Other

RESULT_BLK: Release of results blocked

RVK_SRVC: All services revoked

S_COR_BLK: System generated correspondence blocked

STOPREFUND: Stop refund

SUS_COURSE: Enrollment suspended in specific program for defined period

SUS_SRVC: All services withdrawn; to be reinstated when obligations met

TRANS_BLK: Issue of academic transcript blocked

Navigation

Person Reference > Holds > Person Hold Types

Additional Notes and Business Rules

Hold categories: Hold categories are **Academic** and **Administrative**.

6.8 Person Details IGSPE034

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

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

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

See *Oracle Student System User Guide* to create person details.

6.9 SEVIS Reporting

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

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

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

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

6.9.1 Exchanging Data with SEVIS

There are two methods of exchanging data with SEVIS:

- **Real-Time Data Exchange:** The first method of exchanging data with SEVIS is a real-time data exchange over the Internet. Oracle Student System does not support this type of exchange.
- **Batch Interface:** The second method of exchanging data with SEVIS involves a batch data exchange process. Oracle Student System creates a batch interface with SEVIS. The interface is a two-way communication interface performed in batch mode over the Internet. The third party vendor exchange to SEVIS from the Oracle Student System interface consists of a series of requests and responses, providing Oracle Student System with the ability to upload student and exchange visitor data to a third party vendor in DTD (Data Transfer Definition) format.

Oracle Student System collects student and exchange visitor data at the institutional level and provides that information to SEVIS, which is stored in a centrally located database. Oracle Student System sends to third party vendor all new and/or updated student and exchange visitor data that needs to be processed. All data elements must be transmitted to the INS SEVIS within SEVIS's required period of time of entry or updated into Oracle Student System. SEVIS receives each transmission and generates a set of validation data along with data required for the printing of the forms. You can access this data within SEVIS's required period of time by reconnecting to the SEVIS Batch Interface and requesting the current transfer of information.

Functionality Support for the Batch Interface

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

- Generating and sending of XML files
- Receiving XML files and validation results
- Parsing and processing XML files

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

6.9.2 Oracle Student System and SEVIS Processing

Oracle Student System performs the following tasks:

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

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

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

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

To enforce data transmission security and data integrity, the SEVIS Batch Interface performs numerous security checks. First, the SEVIS Batch Interface uses an Internet protocol to require login and password validation at the time of data transmission. Second, it uses digital certificates to authenticate the sender's identity. Third, SSL is used to encrypt the network packages prior to transmitting over the public Internet.

6.9.3 Minimum SEVIS Setup and Processing Steps

At minimum, to enable SEVIS functionality, you must:

- Register your institution with SEVIS and enter the SEVIS IDs in Oracle Student System as alternate IDs (SEVIS program code and SEVIS school code)
- Install Oracle XML Gateway
- Assign the SEVIS Administrator responsibility to the individual(s) at your institution responsible for international students
- Set the IGS: Student and Exchange Visitor Information System Enabled profile option to Yes

- Set the SEVIS Debug Option profile option to Yes if you would like log file that lists the process flow
- Select a third party vendor to transfer and receive SEVIS data
- Run the IGS: SEVIS Exchange Visitors Batch Process or IGS: SEVIS Non-Immigrant Batch Process to transfer data to a third party vendor that connects to SEVIS
- Receive data processed by SEVIS through third party vendor. This third party vendor must accept DTD and not XML Schema based messages.

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

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

6.9.3.1 Setting Up Oracle XML Gateway

You must set up Oracle XML Gateway to enable files to be transmitted to SEVIS in XML format.

Responsibility

System Administrator

Steps

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

6.9.3.2 Define Hubs

Define hubs to exchange information with SEVIS

Responsibility

XML Gateway

Navigation

Setup > Define Hub > Hub Definitions

Steps

Enter a user-defined hub in the Hub field.

6.9.3.3 Set Up Trading Partners

Set up trading partners to allow third party software to transfer information.

Responsibility

XML Gateway

Navigation

Setup > Trading Partner > Trading Partner Setup

Steps

1. In the **Trading Partner Type** field, select **Customer** from the list of values.
2. In the **Transaction Types** field, select the seeded transaction types from the list of values. Enter **SEVISI** and **SEVISEVI** for inputting information from third party vendor. Enter **SEVISO** and **SEVISEVO** for outputting information to third party vendor.
3. In the **Map** field, select the associated map from the list of values. Enter **IGS_SV_NI_IN** for **SEVIS-I** and **IGS_SV_NI_OUT** for **SEVISO**. Enter **IGS_SV_EV_IN** for **SEVISEVI** and **IGS_SV_EV_OUT** for **SEVISEVO**.

6.9.4 Entering SEVIS IDs for Institutions

Enter SEVIS IDs for institutions. These IDs are supplied by SEVIS for each institution. You must enter your ID and send it each time you send a file to SEVIS.

Prerequisites

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

Navigation

Setups > Organizational Structure > Organizational Structure Setup > Institutions > Institutions > Institutions Details > Identifier

Steps

1. In the **ID Type** field, select **SEVIS Identifier** from the list of values.
2. Enter your SEVIS ID for non-immigrant students in the **Alternate ID** field.
3. In the **ID Type** field, select **SEVIS Program Code** from the list of values.

4. Enter your SEVIS ID for exchange visitors in the **Alternate ID** field.
5. Save your work.

6.9.5 Creating and Updating Exchange Visitor and Dependent Information

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

The following information is created or updated:

- Person citizenship
- Person international dependent
- Person international dependent terminate/activate
- Exchange visitor
- Person felony

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

6.9.6 IGS: SEVIS Exchange Visitors Batch Process Concurrent Process

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

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

Prerequisites

The profile option IGS: SEVIS Enabled is set to **Yes**.

Responsibility

SEVIS Administrator

6.9.7 Creating and Updating NonImmigrant Information

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

The following information is created or updated:

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

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

6.9.8 IGS: SEVIS Non-Immigrant Batch Process Concurrent Process

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

Prerequisites

The profile option IGS: SEVIS Enabled is set to **Yes**.

Responsibility

SEVIS Administrator

6.9.9 Transferring Data from Oracle Student System to Third Party Vendor

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

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

- Process new and updated student or exchange visitor records in Oracle Student System
- Perform validation on records: The validation ensure that all required information, based on SEVIS data elements, is available.

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

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

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

6.9.10 IGS: Purge Active Exchange Visitor Batch Concurrent Process

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

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

Prerequisites

The profile option IGS: SEVIS Enabled is set to **Yes**.

Responsibility

SEVIS Administrator

6.9.11 IGS: Purge Active Non-Immigrant Batch Concurrent Process

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

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

Prerequisites

The profile option IGS: SEVIS Enabled is set to **Yes**.

Responsibility

SEVIS Administrator

6.10 Oracle Discoverer

Installing Oracle Discoverer provides you with the ability to create dynamic person ID groups based on sets of criteria and use these dynamic groups throughout Oracle Student System.

6.10.1 Dynamic Person ID Groups

Oracle Discoverer creates complex SQL queries and is stored or inserted in Oracle Student System for generating dynamic person ID groups.

To be able to use Oracle Discoverer to create dynamic person ID groups, you must complete Oracle Discoverer Administrator setup. This includes:

- Selecting a database link
- Creating a business area
- Creating new folders
- Setting End User Layer

Next, you must create workbooks in Oracle Discoverer. This includes:

- Creating a new workbook
- Defining query / build list - worksheets

The Person ID Group procedure creates and manages groups of people with a characteristic or characteristics in common through the self-service Groups page.

See Also

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

See *Oracle Discoverer 4i User's Guide* for information about using Oracle Discoverer.

6.10.2 Oracle Discoverer Implementation Considerations

Oracle Discoverer Administrator setup must be complete.

An Oracle Discoverer End User Layer (EUL) can be built from Oracle Student System business views. The EUL is a server based, low maintenance, powerful metadata repository and query management engine for data warehouses and

on-line transaction processing (OLTP) systems. The EUL is centrally stored in the RDBMS for scalability and ease of maintenance.

A function must be registered within Oracle Discoverer Administrator using the System Administrator responsibility. The name of the OSS Function to register is **IGS_POST_SAVE_DOCUMENT**. The Display Name must be **eul_trigger\$igs_post_save_document**. The package must be **IGS_PE_DYNAMIC_PERSID_GROUP**.

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

All Oracle Student System users can select both static person ID groups and dynamic person ID groups from the list of values in each subsystem.

6.10.3 Oracle Discoverer Setup

The iAS must be installed on middle tier. EUL must be available during installation.

There are three major components of Oracle Discoverer required to be installed:

- Oracle Discoverer Server
- Oracle Discoverer Plus
- Oracle Discoverer Viewer

You must install Oracle Discoverer Administrator to install and import the EUL and to register the function from Oracle Student System.

6.10.3.1 Configuring Discoverer

After Oracle Discoverer is installed, you must configure it before running it.

Prerequisites

Oracle Discoverer tools are installed and configured.

The iAS is installed on middle tier.

Oracle Discoverer Administrator edition is installed.

An EUL is provided.

Steps

1. Grant EUL Administration privileges to Administrator and EUL User privileges to Oracle Applications responsibilities.

Administrator should have full access to all Business Areas.

2. Update the Oracle Discoverer profiles in the application log in as Administrator to System Admin.

Profile options required to be updated are:

- **ICX: Discoverer Release** - Specify the Discoverer Release.
- **ICX: Discoverer End User Layer Schema Prefix** - Prefix for EUL.
- **ICX: Discoverer Launcher** - URL for pointing out the Discoverer Server launch page.
- **ICX: Discoverer Viewer Launcher** - URL for pointing out the Discoverer Viewer Servlet.
- **ICX: Discoverer Use Viewer** - Discoverer Plus or Discoverer Viewer. Select Y to launch Discoverer Viewer. Select N to launch Discoverer Plus. Default is Discoverer Plus.

All of the profile options are user-defined at the Site level.

6.10.3.2 Performing Administrator Tasks

Oracle Discoverer shows all lists and generates complex SQL query internally. To generate the lists of records or view information, you do not need to know database structure or SQL.

The process for setting up Oracle Discoverer involves the following:

- Completing the administrator tasks in Oracle Discoverer as System Administrator
- Creating workbooks in Discoverer as Oracle Discoverer User
- Saving the desired value or required dynamic query from Oracle Discoverer

6.10.3.2.1 Completing the Administrator Tasks in Discoverer

Creating Workbooks

You must use Oracle Discoverer Viewer to create new workbooks and worksheets for dynamic person ID groups.

You do not need any database knowledge to create new queries and generate list (worksheet) or group of lists (workbook).

You can create multiple worksheets in one workbook. By defining user-designated criteria, you can obtain a complex Static SQL query, which will be used by individual teams in Oracle Student System to generate dynamic person ID groups (lists of students).

Prerequisites

Oracle Discoverer tools are installed and configured.

The iAS is installed on middle tier.

Oracle Discoverer Administrator edition is installed.

An EUL is provided.

Oracle Discoverer is configured.

ICX Profile options are set to invoke the Oracle Discoverer Viewer.

The business area according to the requirement or functionality is defined.

Folders (business entities) are defined.

Responsibility

System Administrator

Steps

Select Folders (business entities) and Folder Items and follow the steps to create a new list.

Oracle Discoverer constructs the new complex SQL query. A generated list can be saved in Oracle Discoverer. When you save the query, a new workbook and worksheet are created automatically.

6.10.3.2.2 Saving Desired Value or Required Dynamic Query Oracle Discoverer provides a method to store workbooks or worksheets in Oracle Student System by implementing a PL/SQL interface.

After the record is saved in the Oracle Student System table with required information, it will be available to any subsystem to use. These dynamic person ID groups are accessed through views and / or APIs.

The table in which dynamic SQL are stored is:

- IGS_PE_DYN_SQL

Note: If Oracle Marketing is also installed and also using Oracle Discoverer to generate dynamic SQL, then you must register an OSS function that also inserts data into Oracle Student System tables.

6.10.4 Creating Dynamic Person ID Groups

Create dynamic person ID groups to dynamically create groups of students who share characteristics defined by the SQL query. On the self-service page, select a file or workbook that you created in Oracle Discoverer.

Prerequisites

Oracle Discoverer query is saved.

Responsibility

OSS Administrator Self Service

OSS Administrative Admission Self Service

OSS Registrar: Student Support Self Service

OSS Administrative Advisor Self Service

Navigation

Click the **Create Dynamic Person ID Group** link on the home page

Additional Notes and Business Rules

On the Groups self-service page, you can query existing Groups or click the **Create Group** button to create a new Group. Enter the required information, including the File Name. At this point, when you save, the information is inserted into the **IGS_PE_PERSID_GROUP_ALL** table.

6.11 Oracle Receivables

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

See Also

See *Oracle Receivables User Guide* for information about setting up Oracle Receivables.

6.11.0.1 Person Address Validation

To support person address validation, the following minimum setup is required in Oracle Receivables: System Options window.

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 window has many prerequisite setup steps. See *Oracle Receivables User Guide* for details.

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

6.12 Oracle Human Resource Management Systems

Oracle Human Resource Management Systems enables you to maintain records for employees and staff. Employment Category and Person Type are the only two pieces of functionality which are directly integrated with Oracle Human Resource Management Systems.

For Oracle Human Resource Management Systems 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 Oracle Human Resource Management Systems to implement Oracle Student System.

When Oracle Human Resource Management Systems is fully implemented, HR data can be made viewable in Oracle Student System by setting up the employment categories and the person type mapping. There is no other specific profile option or flag to be activated in order to achieve this.

If you already have Oracle Human Resource Management Systems installed, you may have established your staff and administrators as employees of the institution in Oracle Human Resource Management Systems.

Oracle Student System does not share the same common data model for defining a person as a staff member or an administrator. To prevent duplication of data entry for both products, you must map Oracle Human Resource Management Systems person type definitions with the Oracle Student System person type definitions.

In Oracle Student System, multiple person types of Staff, Administrator, and others must be mapped to an Oracle Human Resource Management Systems type of Employee.

Person data created in Oracle Human Resource Management Systems is passed to Oracle Trading Community Architecture tables. Because of the integration of Oracle Human Resource Management Systems and Oracle Trading Community Architecture and also the integration between Oracle Trading Community Architecture and Oracle Student System, this data is then viewable in Oracle Student System. Data created through Oracle Student System in the Oracle Trading Community Architecture tables does not appear in Oracle Human Resource Management Systems. You cannot update HR data from Oracle Student System.

See Also

See Oracle Human Resource Management Systems Person Types for detailed information.

6.13 Oracle Trading Community Architecture

Oracle Trading Community Architecture is the architecture data model to store common information about parties (persons or organizations). Oracle Student System inserts and updates much of the data on the windows through the Oracle Trading Community Architecture APIs. It is then stored in Oracle Trading Community Architecture tables, not Oracle Student System tables.

See Also

For more information on Oracle Trading Community Architecture, see the following:

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

When person or organization data is entered or imported into Oracle Student System, it is inserted into HZ_PARTIES and related tables that are used by Oracle Student System. The table below shows some of the Oracle Trading Community Architecture tables that are currently used by the main Oracle Student System entities.

Additional information about a person or organization is retained in Oracle Student System tables not included in Oracle Trading Community Architecture.

No setup is required to enable Oracle Trading Community Architecture in Oracle Student System.

The following table describes Oracle Trading Community Architecture in Oracle Student System.

Table 6–5 Relationships

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

System Wide Services: Calendar

7.1 Calendar Overview

Calendar is a centralized facility that permits you to establish various types of calendar, representing your academic calendar. It allows you to set up academic terms as required and define multiple teaching periods within terms. Calendars can be established for the various types of processing windows that exist in the administrative cycles of an institution, such as Admission, Enrollment, Examination.

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

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

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

Calendars with a status of Planned cannot be rolled over for use of the other subsystems in Oracle Student System until the calendar status is changed to Active. A calendar cannot be inactivated after it has child records or has been used in a process.

RECOMMENDATION: Set up one instance of a teaching calendar type per academic year to prevent the duplication of credit for calculations such as attendance type.

7.1.1 Terminology

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

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

The following table describes Calendar terminology.

Table 7–1 Calendar Terms

Term	Traditional Calendar Equivalent	Defined By	Example
Calendar category	Gregorian, Julian, Lunar, Jewish, Islamic, Mayan, Chinese, etc.	System	Teaching, Academic, Fee
Calendar type	Annual, monthly, civil, religious, fiscal, etc.	User-defined within a calendar category	Standard academic year, semester 1,fall, spring
Calendar instance	Annual calendar, such as calendar for 2003	Start and end dates for a particular calendar type	Semester 1, 2003; start 01-SEP-2004,end 01-JAN-2005
Date alias	Event, such as Labor Day holiday or start of term or institution holiday	User-defined	Start of semester1; census date
Date alias instance	When event occurs, such as the specific date of Labor Day holiday in one particular year	Date assigned to a particular calendar instance	Start of semester 1, 01-SEP-2004

7.2 Setting Up Teaching Period Codes IGSAD017

Teaching period codes are mapped to user-defined teaching calendars in the Calendar Types window. Examples of teaching periods include fall, spring, summer, and winter.

Navigation

Admission > Admission Setup > Setup Application > Teaching Period Codes

Additional Notes and Business Rules

Teaching period: Enter a user-defined teaching period code to identify a teaching period.

7.3 Calendar

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

First, map the user-defined calendar status to the system calendar status. The calendar status describes if the calendar is active, planned, or inactive.

Then, create a user-defined calendar type and map that to a seeded calendar category. Create types for academic calendars, fall terms, and teaching periods, summer semesters, and others to fill your calendar needs.

Create calendar instances. Your calendar instances describe calendars, such as 2004 and 2005. A calendar instance is the start and end date for a particular calendar.

Next, create calendar instance relationships. In most cases, the Academic calendar category will be the parent to all other calendar categories. This means that, for example, your Admission, Enrollment, and Teaching calendars will be subordinate to your Academic calendar. Creating calendar instance relationships allows you to associate smaller, event-specific calendars to your main Academic calendar.

Create date alias categories to group similar events. You can create a date alias category, for example, for an enrollment fair, and group all date aliases related to events during the enrollment fair.

Create date aliases and set date alias offset constraints for your date aliases. Do this so that the value of a date alias (for example, the last day to enroll) does not fall on a weekend or holiday.

Create date alias instance offsets by entering specific dates for date aliases and separating the date aliases by periods of time. Use date alias instance offsets, for example, if you want to have a school break three weeks after the start of a specific semester.

Next, enter date alias instances. Enter specific holidays, the actual start dates of semesters, and the actual start dates of various events that occur within your calendar.

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

Note: Almost every calendar will have a relationship with the Term (Load) calendar.

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

Calendar categories are seeded so that each subsystem can identify its respective calendars. Calendar categories are mandatory because they define types of calendars.

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

For example, linking the date alias ST_LECT to the calendar category TEACHING means that instances of the date alias ST_LECT can only be created in TEACHING calendar instances. The date alias ST_LECT cannot be created in all other calendar category calendar instances.

Calendar categories include the following:

- **Academic:** Top level structure of calendars. Usually, the Academic calendar will be a parent to all other calendars. Set up your program offering and attach it to Academic calendars.
- **Award:** Use in Financial Aid only.
- **Fee:** Use in Student Finance to create dates for payments.
- **Holiday:** Create school breaks for holidays such as Christmas.
- **Teaching:** Attach unit sections to specific semesters or term periods.
- **Admission:** Determine the deadlines for admission.
- **Enrollment:** Specify dates for which students can enroll.
- **Finance:** Use for the fiscal year related to accounting
- **Load:** Also referred to as Academic Term. Used to create specific terms and semesters.
- **User-defined:** Create additional calendars to suit your needs.
- **Assessment:** Create dates for which faculty members assign grades for coursework.
- **Exam:** Create dates on which examinations are to be scheduled for unit sections

- **Graduation:** Create dates for graduation ceremonies.
- **Progression:** Create cycles by which student progression is measured. Progression calendars are used in many progression rules.

7.3.1 Setting Up Calendar Statuses IGSCA001

Calendar statuses describe the level of activity of a calendar.

Examples of calendar statuses include Current, Projected, and Suspended. These user-defined calendar statuses are mapped to system calendar statuses of Active, Planned, and Inactive.

Planned: Calendars that are still in the planning phase, and not yet available for use in other parts of Oracle Student System

Active: Calendars that have been made available to other subsystems of Oracle Student System and are valid

Inactive: Calendar which has been shut-off from use in other subsystems, and will not be considered in processing logic. Inactive does not represent a calendar that has passed, but one that has been taken out of service due to error or other circumstance.

Navigation

Setups > Calendars > Calendar Statuses

Additional Notes and Business Rules

Deletion: You cannot delete a calendar status already assigned to a calendar instance. Instead, you should close the calendar status to prevent further use.

7.3.2 Setting Up Calendar IGSCA002

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

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

- ACAD-YR for academic year
- FALL for the fall term
- SEM-2 for semester 2

Calendar Instances

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

Instances with a calendar category of Academic, Teaching, Admission, Load, Award, and Progression must be assigned an alternate code. The alternate code is a simple and quick way of identifying a particular calendar instance without having to enter the calendar type, start date, and end date. The alternate code is used to speed data entry in other subsystems. An instance also has an associated description, which is typically used for displaying and entry of calendars in the user interface.

The start and end dates are dates most meaningful to your institution to represent the calendar period. The vast majority of functionality is tied to date aliases rather than relying on the start and end dates of a calendar instance. The start and end dates should be aligned with the normal dates of activities in your institution, and you can include date aliases before and after the start and end dates in the cases of early or late processing.

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

For example, a calendar instance defining Semester 2 Teaching Period for 2003 could be created by assigning the start and end dates of January 1, 2003, and June 30, 2003, to a calendar type SEM-2, and assigning it the alternate code SEM2-03, and description of 2003 Semester 2 Teaching Period.

Prerequisites

Teaching period codes are set up.

Navigation

Setups > Calendars > Calendars > Calendars

Additional Notes and Business Rules

Deletion: You can delete a calendar type only if there is no existing calendar instance. It is not advisable to modify a calendar type with an existing calendar instance.

Calendar category: A calendar category is a system category to which the calendar type belongs.

Abbreviation: This field is required for Admission category calendar types.

Teaching Period Code: Enter an automated result transfer system code required for a calendar of category teaching and optional for other calendar categories.

Calendar Status: You can only delete calendar instances that have the calendar status of Planned. You cannot change calendar status from Planned to Inactive, Inactive or Active to Planned. You cannot change the teaching calendar status from active to inactive if there are associated enrollment activities in the unit section for the specific calendar. Examples of enrollment activities are Enrolled, Waitlisted, Invalid, Duplicated, Completed, or Discontinued.

Alternate Code: This field is required for Academic, Admission, Load, Teaching, Progression, and Award calendar categories. This field defaults to the year of the calendar start date for academic calendar category. An alternate code must be a unique identifier for a calendar instance.

Description: This field is used to display the label for a calendar instance in self-service and selected windows. An example of the description is Fall 16 Week Teaching 2004.

7.3.3 Setting Up Rollover Calendar Instances IGSCA003

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

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

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

The Rollover Calendar Instance window displays the calendar instance carried forward from the Calendar Types window to be rolled over and the start and end dates of the new calendar. For example, calendar instance Semester1, in date format 09/01/03 > 12/01/03, can be used to create the new calendar instance Semester1, in date format 09/01/04 > 12/01/04, using the rollover process. The process also carries forward to the new calendar any related date alias instances, such as start of

lectures, and all subordinate calendars, such as exam or fee calendars, that were attached to the source calendar.

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

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

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

Calendar Instance Relationships in the Rollover Process

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

For example, if an Admission calendar instance for Fall 2003 is rolled over for Fall 2004 then a superior calendar instance must be specified in the Calendar Instance Relationship like Academic Year 2004-2005.

Navigation

Setups > Calendars > Calendars

Additional Notes and Business Rules

Rollover: The rollover start date must be after the start date of the existing calendar instance. The future effective period will be the same length in time as the current effective period. A calendar cannot be rolled over to an instance that already exists. You cannot rollover inactive calendar instances and calendar instances with closed calendar type.

7.3.4 Setting Up Calendar Instance Relationships IGSCA004

Set up relationships between superior and subordinate calendars. The required relationships must be established for all calendar periods defined. For example,

when dealing with teaching periods, Oracle Student System expects to be able to find the academic parent for internal processing. The recommended approach is to define the academic parent calendar once for your earliest year, and then use the rollover functionality to roll the academic parent calendar forward, removing the need to repeatedly recreate everything.

The optional relationships are typically related to particular pieces of functionality and are required if that functionality is being used within the particular calendar period. For example, if you plan to apply attendance type based rules in the 2003 Fall Progression period, then you must establish the optional relationship to the load calendar.

It is possible in some cases to group a type of calendar for the purposes of processing or reporting. For example, you can choose to create an undergraduate and a graduate assessment fall assessment period. You can also choose to group those under a superior fall assessment period, which could be used for processing (for example, assigning administrative grades).

Since other subsystems depend on calendar relationships, Oracle Student System validates them when they are set up.

Load calendar is also the academic term calendar.

The following table describes calendar relationship rules.

Table 7–2 Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships Note: These are mandatory relationships when using the respective subsystem.
Userdef	All	All	None
Academic	Userdef	Admission	Admission
Academic	Userdef	Assessment	Assessment
Academic	Userdef	Enrollment	Enrollment
Academic	Userdef	Exam	Exam
Academic	Userdef	Fee	Fee
Academic	Userdef	Load	Load
Academic	Userdef	Progress	Progress
Academic	Userdef	Teaching	Teaching
Academic	Userdef	Userdef	None
Academic	Userdef	Holiday	None
Academic	Userdef	Graduation	None
Admission	Academic	Enrollment	Academic
Admission	Teaching	Userdef	Load
Admission	Userdef	Load	Enrollment
Enrollment	Academic	Userdef	Academic
Enrollment	Admission	None	Enrollment
Enrollment	Userdef	None	None
Assessment	Assessment	Assessment	Academic
Assessment	Academic	Teaching	Teaching
Assessment	Userdef	None	None
Exam	Exam	Exam	Academic
Exam	Academic	Teaching	Teaching
Exam	Userdef	Userdef	None

Table 7–2 (Cont.) Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships
			Note: These are mandatory relationships when using the respective subsystem.
Graduation	Academic	Userdef	None
Graduation	Userdef	None	None
Fee	Academic	Load	Academic
Fee	Finance	Userdef	None
Fee	Userdef	None	None
Finance	Userdef	Fee	None
Finance	None	Userdef	None
Load	Academic	Userdef	Academic
Load	Fee	None	Admission
Load	Userdef	None	Award
Load	Admission	None	None
Load	Progress	None	None
Load	Award	None	None
Progress	Academic	Teaching	Academic
Progress	Userdef	Userdef	Teaching
Progress	None	Load	None

Table 7–2 (Cont.) Calendar Relationship Rules

Calendar Category	Permitted Superior Calendar Categories	Permitted Subordinate Calendar Categories	Mandatory Relationships
			Note: These are mandatory relationships when using the respective subsystem.
Teaching	Academic	Admission	Academic
Teaching	Assessment	Userdef	Assessment
Teaching	Exam	None	Exam
Teaching	Progress	None	Progress
Teaching	Userdef	None	None
Holiday	Academic	Holiday	None
Holiday	Holiday	Userdef	None
Holiday	Userdef	None	None
Award	Userdef	Load	Load
Award	None	Userdef	None

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

Setting a progression calendar superior to a load calendar is an optional relationship used for the purposes of linking an enrollment term used in some types of progression rules. Particularly where a rule is applied specific to an attendance type, Oracle Student System uses the relationship to determine the attendance type of the student applicable to the progression period.

Prerequisites

Calendar types are set up.

Navigation

Setups > Calendars > Calendars

Additional Notes and Business Rules

Active and Planned: If the context calendar instance is active, superior calendar must be active; if context calendar instance is inactive, superior calendar can be active or inactive; if context calendar instance is planned, superior calendar can be active or planned.

Active, Inactive, and Planned: If the context calendar instance is active, subordinate calendar can be active, inactive, or planned; if context calendar instance is inactive, subordinate calendar must be inactive; if context calendar instance is planned, subordinate calendar must be planned.

Load category: A calendar instance of load category must have a load research percentage assigned to it.

7.4 Date Alias

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

Alterable Date Aliases

Not all date aliases can be altered. The following are date aliases that can be altered to a future date. User-defined date aliases are set in subsystems in the subsystem-specific setup windows. For example, Census date is specified in an enrollment window. You can choose to use one of your existing institutional date aliases to fill this need. A date alias called Teaching Week 4 can be used as census date.

Admissions subsystem

- Last Day to Receive Admissions Applications
- **Last Day to Change Program Preferences:** Date must be before final date of receipt.
- Final Date of Receipt
- Offer Response Date
- **Short Admission Process Period:** Date must be after initialize admission period and before final date of receipt.
- Admission Processing Tracking

- Post Admission Tracking

Enrollment subsystem

- Start Cutoff
- Record Cutoff
- Program Completion Date
- Record Open
- Variation Cutoff
- Sub Unit
- Package Production
- Form Due
- Enrollment Rule Cutoff
- Invalid Rule Cutoff
- Enrollment Cleanup
- Grading Schema
- Lapsed

Academic Records subsystem

- Assessment Item Variation Cutoff
- Midterm Marks/Grades Submission Start Date
- Midterm Marks/Grades Submission End Date
- Early Final Marks/Grades Submission Start Date
- Early Final Marks/Grades Submission End Date
- Final Mark/Grades Submission Start Date
- Final Mark/Grades Submission End Date
- Examination Day #
- Graduation Start Date
- Graduation End Date
- Graduation Ceremony Date

Mandatory and Accurate Date Aliases

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

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

The following are mandatory date aliases.

Admissions subsystem

- Initialize Admission Period
- Encumbrance Check Date
- **Program Start Date:** Students cannot enroll after the program start date.

These three dates are the value to be used for a derived completion date, at admissions stage, based on the term in which the student expects to complete:

- Mid Completion Period
- Summer Completion
- End of Year Completion

Academic Records subsystem

- Progression Effective End Date
- Progression Apply Start Date
- Progression End Benefit
- Progression End Penalty
- Progression Showcase Cutoff
- Progression Appeal Cutoff
- Progression Hold End Date

Enrollment subsystem

- **Census Date:** Student Load for load or teaching period.
- Effective Enrollment Start Date
- **Load Effective:** Date on which the load calendar is considered current for the purposes of defaulting in user interfaces

- Start of Academic Year
- Unit Discontinuation Dates:
 - **Early Withdrawal:** Derives discontinuation and must be accurate if present, otherwise optional for administrative unit status
 - **Late Unit Withdrawal:** Derives discontinuation and must be accurate if present, otherwise optional for administrative unit status
 - **Late Unit Withdrawal > Fail:** Derives discontinuation and must be accurate if present, otherwise optional for administrative unit status
 - **Late Unit Withdrawal – Failed Grade Waived:** Derives discontinuation and must be accurate if present, otherwise optional for administrative unit status
- Research Effective Start Date
- Research Effective End Date
- **Withdrawal from Research:** Variant of unit discontinuation dates but within the teaching period defined for research students
- **Withdrawal from Research after Census Date:** Variant of unit discontinuation dates but within the teaching period defined for research students

Student Finance

- Retroactive Date
- Start Date
- End Date
- First Retention Date
- Second Retention Date
- Refund Period

Financial Aid

- No NSLDS History Disbursement Offset
- Disbursement Expiration Offset
- Verification Enforcement Date Offset
- Disbursement Offset

7.4.1 Setting Up Date Alias Categories IGSCA005

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

These categories can be defined for anything you want. These categories are a user-defined categorization and do not have any system-related functionality tied to them.

Navigation

Setups > Calendars > Date Alias Categories

Additional Notes and Business Rules

Date alias categories: Date alias categories are user-defined category for categorizing date aliases with common attributes. For example, last day to withdraw without penalty and last to withdraw without a failing grade can be categorized as Withdrawal. You cannot delete a date alias category already used in defining a date alias instance.

7.4.2 Setting Up Date Aliases IGSCA006

Date alias is the generic name for a calendar event, not the actual occurrence of an event. A date alias is defined by its name and the date alias category to which it is assigned. It can also be assigned to a calendar category that limits its use exclusively to calendar instances of the same category.

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

Census can be the date alias for any day on which census data is collected for reporting purposes. Census date can occur repeatedly in various teaching or load calendar instances throughout an academic year. Multiple census dates can be defined within terms or teaching periods that run for an extended period and overlap what is typically considered a census reporting period. For example, a year long teaching period may have multiple census dates aligning with those of the standard Fall, Spring and Summer reporting periods.

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

Date Alias Offsets

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

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

Offset constraints can be used to ensure that the date aliases do not fall on defined institution holidays. You can set up Oracle Student System to have a single holiday calendar per academic year containing all of the relevant date aliases. These then flow into the date alias calculations for calculating teaching days.

Holiday calendars are used so the date aliases do not fall on a holiday (this is done through date alias offset constraints). Holiday calendars must be established so that Oracle Student System knows which days are considered institution holidays.

Date Alias Pair

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

For example two date aliases, St-Brk and End-Brk, can define the start and end dates of a midsemester break. Pairing the dates defines the entire period of the break, inclusive of these two dates. When a date alias pair is created for date aliases within a Holiday calendar instance, it effectively defines an institutional break, which is a date alias offset constraints.

Prerequisites

Date alias categories are set up.

Navigation

Setups > Calendars > Date Aliases > Date Aliases

Additional Notes and Business Rules

Calendar category: If you select a calendar category, you limit the use of a date alias to calendar instances of the assigned calendar category.

Offset date alias: To create an offset date alias, enter a date alias from the list of values. Then, in the Offset Duration region, enter the amount of time in addition to the date alias time frame that you want to calculate the date of another event.

Date aliases in calendar instances: Instances of the two date aliases must occur in the same calendar instance.

Offset Duration: Offset duration is the number of days, weeks, months, or years between two date aliases or two date alias instances with an offset relationship.

7.4.3 Setting Up Date Alias Offset Constraints IGSCA007

Create date alias instances that result from a date alias offset relationship set so that the date alias instance cannot fall on specified days.

A date alias can be defined in terms of an offset from another date alias. When an instance of the first date alias is created, the date of the second is calculated as the first date, plus or minus the offset.

Use this window to ensure that the calculation of the second date results in that date falling on an acceptable day. For example, the second date can be constrained to fall outside institution holidays, only on a weekday, only on a Wednesday, or any valid combination of any of the constraints.

Prerequisites

Date aliases are set up.

Navigation

Setups > Calendars > Date Aliases > Date Aliases > Date Alias Offset Constraints

Additional Notes and Business Rules

Defining offset values and offset constraints:

- You cannot define offset values and offset constraints to date alias instances based on holiday calendar.
- System date offset constraint types define the days used in a constraint. Examples include Monday and Friday.
- You are warned of conflicting constraints. If the system is unable to resolve the conflict, it ignores the constraint and calculates alias value from the offset date alias instance.

Conditional operators: Conditional operators (for example, must and must not) act on the constraint.

Resolution days: Resolution days are the number of days a calculated date is moved forward or backward to resolve a constraint. For example, if the resolution days is set to 2, and the constraint Monday, Must Not is set, and the date calculated from the offset falls on a Monday, the date is moved forward two days to Wednesday.

7.5 Date Alias Instance

Date alias instances are the actual dates for specific date aliases.

7.5.1 Setting Up Date Alias Instances IGSCA008

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

Calendar Instance Date Alias Instances IGSCA009

Use this window as an alternative method for setting up date aliases.

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

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

For example, a user can attach the event end of midsemester break, END-BRK, to the calendar instance for semester 1, 2004, SEM-1, 1-SEP-2004 > 15-DEC-2004.

Prerequisites

Calendar types are set up.

Date aliases are set up.

Navigation

Setups > Calendars > Calendars

Additional Notes and Business Rules

Absolute value: The absolute value is the actual date value attached to the date alias instance.

See Appendix E, "Implementation Concurrent Processes" for information about running the Date Alias Instances Report concurrent process.

Setting Up Date Alias Instance Pair

The pairing of date alias instances indicates that the two dates, plus every day between the two dates, are represented by the relationship. When a date alias instance pair is created using alias instances in calendars of category Holiday, it effectively defines an institution break, which is a system date offset constraint types.

A pair relationship can also be defined at the date alias level in the Date Aliases window. For example, a date alias instance ST-BREAK, 15-MAY-2004 is created in a calendar of category Holiday, and it is paired with the date alias instance END-BREAK, 30-MAY-2004, also in a holiday calendar; the system recognizes the period 15-MAY-2004 > 30-MAY-2004 inclusive as an institution break.

Prerequisites

Calendar types are set up.

Date aliases are set up.

Navigation

Setups > Calendars > Calendars > Date Alias Instances > Date Alias Instance Pair

Additional Notes and Business Rules

Related date alias: The related date alias is the date alias related to the context date. For example, END-BREAK is the related date alias of ST-BREAK representing the period of break in calendar category **Holiday**.

7.5.2 Setting Up Date Alias Instance Offset IGSCA010

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

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

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

7.6 Academic Calendars

Academic calendars are set up to represent the academic years that operate within your institution. Typically, you will operate Oracle Student System within instances of a single academic calendar type. However, there may be scenarios where the structure of different schools or locations may warrant the establishment of a separate academic calendar type.

Most of the other categories of calendar exist within an academic structure, and cannot be shared across multiple academic calendar types (with the exception of teaching period).

7.7 Load (Academic Term) Calendars

Load calendars are used to establish the term structure within an academic calendar structure. Only a single stream of terms should be defined within each academic calendar structure. Typically the term structure is defined along fairly standard Fall, Spring, Summer (US) and Semester 1, Semester 2 (other) lines, and the various commencement points and durations of teaching activity defined at the teaching period level.

These category of calendars are used for many purposes within Oracle Student System, such as:

- Calculating a student's attendance type (enrollment status) in a given term for academic and financial aid purposes
- Calculating credit load and FTE values across all teaching activities within a term
- Identifying unit and credit load on which to base fee calculations
- Searching for classes in a given term, considering the various types of teaching periods that may be offered within that term

Enter the following information during set up for load calendars:

- Teaching calendars that link to particular load calendars and the proportion of their load that they contribute
- Administrative unit statuses applicable to the teaching calendars and their relevance to load calculations
- Individual unit versions that link to particular load calendars and the proportion of their load that they contribute

For each load calendar instance selected, the following information can be entered and displayed:

- Links to teaching calendars can be entered and displayed in the Default Load Apportionment region together with the default percentage of load they contribute to the load calendar.
- Individual unit versions corresponding to the teaching calendars can be entered and displayed in the Unit Load Apportionment region together with the percentage of load they contribute to the load calendar.
- For each load calendar and teaching calendar combination, a set of administrative unit statuses can be entered and displayed in the Administrative Unit Status Load region.
- Users typically delete a record while initially setting up the structure only to correct an error. Subsequent alterations to the unit version load apportionment have potential repercussions elsewhere in the system.

CAUTION: Changes in the Load Calendar Structure window can affect load and derived fee calculations, and potentially the derived program attendance type, for all students enrolled in the teaching periods or units linked to the load calendar instances concerned.

The logic used by Oracle Student System when relating load calendars to teaching calendars is that all instances of the nominated teaching calendar type within the same academic calendar instance can be counted towards the load calendar instance.

For example, If Fall 2004 is defined as a load calendar instance existing within the 2004 academic calendar, and you have a Short Session as a calendar type that exists 3 times within the same academic year. When determining the teaching calendars that are related to the Fall 2004 term, Oracle Student System considers all instances of Short Session as they exist within the same academic calendar.

Attendance type is one of the situations that this logic is applied, however, it also drives the logic of anything else that is displaying/using teaching periods within the context of a term. Other situation that this logic is applied include:

- Performing enrollment searches based on term
- Displaying academic history based on term
- Doing maximum credit point checking on a term basis

7.8 Teaching Calendars

Teaching calendars are set up to represent the periods of time in which classes are held within an academic calendar or term structure. These can be established to represent many and varied types and lengths of teaching activities, and then attached to the unit sections that are being taught within the time frame. Teaching periods roll up to Load (Academic Term) calendars for the purposes of attendance type (enrollment status), credit aggregation (for validations such as minimum or maximum credit point checks), and display on screens such as the academic history page.

7.9 Award Calendars

The Award Calendar uses direct relationships to Load Calendars (Terms) to measure student load, create student Costs of Attendance, and distribute financial aid awards to appropriate Load Calendars and Teaching Calendars. A Load Calendar can be related to more than one Award Year.

Financial Aid Date Aliases

The following Date Aliases are used in the Fund Manager setup:

- No NSLDS History Disbursement Date Offset

If a student has no NSLDS history (meaning he is a first time student loan borrower), the first disbursement of his award from the fund (for example, Stafford Loan) can be delayed from the beginning date of his first term of enrollment by using this offset.

- Disbursement Expiration Offset

As of the date set by the Disbursement Expiration Date Offset, disbursements which have not passed the validations to pass from Planned status to Actual status (Credit Points, Attendance Type, Pays Only Programs, Pays Only Units, Pays Only Fee Classes) will not be updated from Planned to Actual automatically. The Awards - Disbursements - Process Records concurrent process cancels the planned disbursements if disbursement expiration date is less than the system date. It logs a

message Canceling disbursement for award <award id >, disbursement <disbursement number> as expiration date has been reached.

- **Verification Enforcement Date Offset**

For disbursements in an Actual status with a the Verification Enforcement Date attached, the disbursement is validated for Credit Points, Attendance Type, Pays Only Programs, Pays Only Units, and/or Pays Only Fee Classes if the Verification Enforcement Date is if disbursement expiration date is less than the system date if the disbursement does not satisfy any one of these checks, it is cancelled automatically by running the Awards - Disbursements -Process Records process.

7.10 Admissions Calendars

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

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

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

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

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

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

7.11 Enrollment Calendars

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

Enrollment calendars represent your enrollment periods. Each enrollment period must be related to a superior academic period, because pre-enrollment is always in the context of an academic year. Each admission period must have a subordinate enrollment period, because admission applications are pre-enrolled into particular enrollment periods.

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

See *Alterable Date Aliases* for information about Enrollment date aliases. In addition, set up the following:

Package Production: Has no system functionality but is expected in the enrollment calendars

Form Due: Date by which an enrollment (based on form) is due to be collected

7.12 Research Calendars

Research calendars are purely a variant of Teaching calendars that usually are defined as separate. If you offer research units in a teaching period, then all of the dates described in this section become mandatory for the calculations described to operate correctly.

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

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

Students, administrative unit statuses and unit discontinuation date aliases enabling withdrawal, without a grade penalty, will likely need to be created. A grading schema also should be created for Research with a reduced set of grades available to research units.

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

1. Establish the required administrative unit statuses, users must map to the system **Discontin** unit attempt status, and link each status to a grading schema code.

Note: The research grading schema must already be set up.

2. Create the required date aliases using the Date Aliases window and include date aliases representing the start and end of a research teaching period. Since these date aliases can only exist in a teaching calendar, their date alias and calendar category types must be **Teaching**. After these date aliases are established, they must be linked to the system effective start and end dates using the Research Calendar Configuration window.
3. Set up research teaching calendar types, for example, **SUM**, **RES-1**, and **RES-2**, and required instances of these calendar types using the Calendar Types window.
4. Establish instances of the date aliases within each research teaching calendar instance using the Calendar Date Alias Instances window. Sets of effective start and end date aliases cannot overlap. These date alias instances, for example, **RES-STRT** and **RES-END**, have implications for Full Time Equivalency, or FTE, calculation that the user must understand before establishing them. If instances of **RES-STRT** and **RES-END** are in a teaching period calendar, the FTE calculation method is determined by whether the associated load calendar has a load research percentage.

Note: The effective start and end date aliases can only exist in a research teaching period with a single census date. The effective start date must come before the end date.

Note: If a calendar instance has effective start and end date alias instances, a single instance of each must exist for the teaching period calendar. Start date and end date date alias instances are dependent in each other.

5. Allocate default load apportionment by linking existing load calendars, research teaching calendars, and administrative unit status load using the Load Calendar Structure window. In this window, the Load Incurred indicator must be set as appropriate for the administrative unit statuses used.
6. Set up the relationships between research teaching calendar instances and the applicable superior academic calendar or subordinate academic calendars, as admissions calendars.

These relationships and values are set up using the Calendar Instance Relationships window. The load research percentage is allocated to the appropriate load calendars in the Subordinate Calendars region. You must scroll across the spread table to

display this field. The load research percentage must total 100% within an academic period.

The load research percentage must be set for applicable load calendars to ensure correct Full Time Equivalency, FTE, or calculation.

Note: The load research percentage must not be allocated to any other load calendar and a null value instead of zero must be used.

For students who need to be enrolled in research units in teaching periods that contribute to other load calendars, for example, the **SUM** teaching period that contributes to the **LOAD-CAL-3** load calendar; the Ts, or FTE, are calculated using the standard method, in which the number of override or enrolled credit points is divided by the standard annual load value.

Effective Start Date and Effective End Date

The effective start date and the effective end date entered in the Research Calendar Configuration window is used in the Research. These dates are used to ensure dates and Equivalent Full Time Student Units are calculated correctly.

7.13 Assessment Calendars

Assessment calendars are set up for assessment processes other than examinations. Like examination calendars, assessment calendars are groupings of teaching periods. They are not referenced in windows but are used mainly as job and report parameters. An assessment calendar defines the set of teaching periods whose associated units are concurrently assessed during an assessment period.

For example, an assessment period **ASS-SEM1** can be associated with the teaching periods **SEM-1**, **S1-E1**, and **S2-E1**. Units associated with these teaching periods are assessed concurrently during this assessment period. When running the Result Sheets, Invalid Grades, and Non-Enrolled Outcomes reports, **ASS-SEM1/2004** can be specified as a parameter rather than running the report for each individual teaching period.

The procedure for setting up assessment calendars includes the following steps:

1. Using the Calendar Types window, create calendar types such as **ASS-SEM1** and **ASS-SEM2**, each with a calendar category of **Assessment**, to represent each assessment period in an academic year.
2. In the same window, create instances of the new calendar type to define each required assessment period. For example, a first semester assessment period

can be represented by the calendar instance **ASS-SEM1 > 01-MAR-2004 > 30-JUN-2004**.

3. Click the **Calendar Relationships** button to access the Calendar Instance Relationships window. Create relationships between each assessment period and the related teaching periods.

Note: Teaching periods are subordinate to assessment periods. This relationship is created between an assessment period and those teaching periods with units that are assessed in the assessment period.

4. Create relationships between assessment periods and superior academic periods.
5. Using the Date Aliases window, create a date alias representing a date after which changes should not be made to unit assessment items.
6. Enter the date alias as the assessment item variation cutoff date alias in the Configure Assessment Calendar window.

7.14 Examination Calendars

Examination calendars are established to define the periods of examination and the days on which examinations are to be held. They are related to the teaching periods in which the appropriate unit sections are being offered, and may represent either standard or supplementary examination periods.

The procedure for setting up examination calendars includes the following steps:

1. Using the Calendar Types window, create a calendar type, such as **Exams**, with a calendar category of **Exam**, which is the type of calendar representing examination periods.
2. In the same window, create instances of the new calendar type to define each required examination period. For example, a first semester examination period can be represented by the calendar instance **EXAMS > 15-DEC-2004 > 21-DEC-2004**.
3. Click the **Calendar Relationships** button to open the Calendar Instance Relationships window. Create relationships between each examination period and the related teaching periods.

Note: Teaching periods are subordinate to examination periods. This relationship is created between an examination period and those teaching periods with units examined in the examination period.

4. Using the Date Aliases window, create date aliases representing days when examinations are held. A separate date alias should be created for each day in an examination period, such as **EXAM-DAY1** and **EXAM-DAY2**.
5. Click the **Date Alias Instance** button in the Date Aliases window to access the Date Alias Instances window. Create instances of the date aliases. Each instance defines a particular date within an examination period when examinations can occur, such as **EXAM-DAY1 > 15-DEC-2004** and **EXAM-DAY2 > 16-DEC-2003**.
6. Define the examination sessions available on each day of an examination period.

After the complete set of examination calendars for a particular academic year are created, the calendar rollover process can create calendars for subsequent years.

7.15 Graduation Calendars

Use the graduation calendar if you want to use the ceremony functionality. Ceremonies are within graduation calendars. You must either establish a single graduation calendar per academic year or a graduation calendar for each of the completion cycles.

System Wide Services: Organizational Structure

8.1 Organizational Structure

Institution detail and structure data entered in the Organizational Structure windows is reference data. Restrict the ability to add, modify, and delete data in these windows to system-wide specialists and system administrators responsible for maintaining institution details and organizational structures. Other users access organizational structure details in other subsystems or through special inquiry or reporting interfaces, and should have read-only access.

Organizational Structure is composed of the following:

- **Institution:** Includes addresses, contacts, identifiers, accreditation details, history, statistics, and notes about your institution and any other institutions that you interact with. These may include high schools, colleges, universities, and external accreditation agencies. You can enter institutions on the Institutions window or through the Institution Import Process.
- **Organizational unit:** Includes addresses, locations, identifiers, accreditation details, history, and notes for a business entity or division within your institution. Typical organizational units include faculties, divisions, schools, departments, branches, and institutes.
- **Location:** Includes address and notes region for institutions and organizational units.
- **Building and Room:** Building code and room code within locations.
- **Function Filter:** Limits organizational units and institutions available in windows of other subsystems.

- **Venue:** Seating, venue codes, and supervisor limits within buildings and rooms to schedule locations and information for exams and graduations.

Organizational Structure is used by several Oracle Student System subsystems, so you must ensure that you have performed the setup correctly.

The Records subsystem uses Organizational Structure details to map:

- Advanced standing applications to grant credit to Institutions
- Exams to venues

The Program Structure and Planning subsystem uses Organizational Structure details to map

- Programs to organizational units. For example, a Bachelor of Art in English is mapped to the English Department organizational unit.
- Units to organizational units. For example, you map English Composition to the English Department organizational unit.
- Units to location codes, and these location codes are inherited by unit sections.
- Unit section occurrences to building and rooms. For example, English Composition 101 for Spring 2004 is mapped to Porter Hall, Room 123.

Organizational unit prerequisites include organizational status, member type, organizational type, and institution. Optional attributes of organizational units include accreditation details, notes, alternate identities, organizational address, and location.

The organizational status prerequisite is system organizational status. The optional attribute of organizational unit relationship is organizational unit.

Institution prerequisites include institution status, institution type, and institution control type. Optional attributes of institutions include accreditation details, notes, alternate identities, government institution code, and institution address. Institution address is not dependent on address usage. Address usage prerequisites include location address and organization address.

Location prerequisites include location type. The optional attribute for location is location relationship. The location type prerequisite is system location type.

8.2 Organizational Structure Configuration

Organizational structure data is information that applies to an entire institution and includes institution address and accreditation status.

8.2.1 Organizational Structure Lookups

Enter user-defined codes for organizational accreditation status (OR_ACCR_STATUS) in the Lookups window to identify the status of accreditation for the institution itself or for each organizational unit. For example, if the English Department is accredited and the History Department is not yet accredited, you need to create *Accredited* and *Pending* codes.

Some of the accreditation codes are already seeded. You may enter more to meet your requirements. These values are used in the list of values for Accreditation Status on the Institutions window, Accreditation tab. They are also used in the list of values for Accreditation Status on the Organization Units window, Accreditation tab.

Navigation

Setups > Lookups

Additional Notes

Query the type OR_ACCR_STATUS and enter user-defined codes.

8.2.2 Organizational Structure Profile Options

Set the following profile option:

- **HZ: Generate Party Number:** Set to generate unique identifier for person IDs and organizational unit IDs

8.2.3 Organization Structure, Institution, and Location Navigation

The **Building** icon represents institution and organizational unit setup. The **Globe** icon represents location setup. Select the appropriate icon to access the setup windows.

In order to create a new node, click on the **Insert** icon or right mouse click. After you set up your institution, it is the first selection on the list.

When you select an institution, organizational unit, location, building, room, or venue in the left pane, a corresponding display-only tab page will appear in the right pane. A **Details** button opens windows where you can update information.

Select the **Building** icon to access institution and organization windows and tabs. Select the **Globe** icon to access location windows and tabs.

You can save personal or public shortcut nodes in the Organizational Structure Setup window. To save public shortcuts, set the FND: APPTREE profile option to Y at both the site level and the user level.

8.2.4 Organizational Structure Data Setup - Note Type Tab IGSOR032

Organizational structure note types are user-defined codes representing a type of note that can be recorded against an institution, an organizational unit, or a location. For example, a user-defined code of **Admin** could represent an administrative note.

Organizational structure note types must be set up before you can use notes. The note types populate the lists of values in the Organizational Units, Institutions, and Locations windows, depending on the check boxes you select. While in these windows, click **Notes** to add notes mapped to the user-defined note type.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Note Type

Additional Notes and Business Rules

Case-sensitive: Use uppercase letters for note types.

8.2.5 Organizational Structure Data Setup - Alternate ID Tab IGSOR032

Organizational structure alternate ID types are user defined codes that represent a mapping between OSS and external agencies. Examples include SEVIS IDs, Dun and Bradstreet Numbers, and Pell IDs.

For example, you create an alternate ID type of **Profession** for an organization or institution for receiving professional school accreditation.

The alternate ID types that you set up in this tab populate the lists of values in the Organizational Units and Institutions windows, depending on the check boxes you select. In those windows, select the alternate ID type for which you want to enter a user-defined code. This user-defined code is stored in Oracle Student System and appears in various fields throughout the Organizational Structure windows.

Navigation

Setups > Organizational Structure > Organizational Structure Data Setup > Alternate ID Types

Additional Notes and Business Rules

Case-sensitive: Use uppercase letters for alternate identifier types.

UK: Enter **HESA_INST** as the HESA institution alternate identifier type. This must be set up, and should have a system ID type of **HESA Institution Identifier**.

SEVIS: Enter your SEVIS program code and your SEVIS school code for SEVIS functionality to properly function:

- Select SEVIS program code for your exchange visitors code.
- Select SEVIS school code for your non-immigrant student code.

CAUTION:

- Do not use closed alternate ID types.
- You can only have one alternate ID for each alternate identifier type.
- Only one ID type can be identified as a preferred alternate ID type for an organizational unit or institution.

8.2.6 Organizational Structure Data Setup - Localization Tab IGSOR032

Oracle Student System provides standard functionality common to all countries as well as functionality specific to a localization. Functionality specific to one country, the United Kingdom, for example, is not used by the United States.

Navigation

Setups > Organizational Structure > Organizational Structure Data Setup > Localization

Additional Notes and Business Rules

Profile Option: Set up or update the IGS: Country Code profile option in this tab.

Local Institution: In this release, a new **Local Institution** field allows you to set or update the Profile Option **IGS: Local Institution**.

You can only view the Local Institution indicator on the Institution window.

8.3 Institutions

Institution data is information that applies to an entire institution such as address, status, and type.

You can set up external institutions for granting advanced standing, entering or importing academic history, or sharing information among other purposes.

8.3.1 Institutions Lookups

Create user-defined codes to be used in list of values on the Institutions window and throughout Oracle Student System.

Navigation

Setups > Lookups

Additional Notes and Business Rules

Query the lookup type and enter user-defined codes if desired.

OR_INST_GOV_CD is user-defined. All other institution lookups are extensible.

Lookups:

- **OR_INST_CTL_TYPE Institution Control Type:** Type of institution such as parochial, home school, private
- **OR_INST_GOV_CD Government Institution Code:** Government-recognized codes to describe the institution. UK users should set up the HESA institution codes as government institution codes.
- **OR_INST_PRIORITY_CD Institution Priority Code:** Priority assigned to an institution This is an optional lookup for informational purposes for an institution.
- **OR_INST_STAT_TYPE Institution Statistic Type:** Codes to gather and report institution statistics such as percentage of secondary school graduates.

8.3.2 Organizational Structure Data Setup - Institution Types Tab IGSOR032

Institution types are user-defined values. They are mapped to the system types *Secondary*, *Post Secondary*, and *Other*. Examples include:

HIGH: *Secondary*

4-YEAR: *Post Secondary*

ACCRED AGY: *Other*

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Institution Type

Additional Notes and Business Rules

Case-sensitive: Use uppercase letters for institution types.

Closed types: Do not use closed types.

8.3.3 Organizational Structure Data Setup - Institution Status Tab IGSOR032

User-defined institution statuses describe whether or not an institution is active or inactive. They are mapped to the system institution statuses of *Active* and *Inactive*. Examples include:

CURRENT: *Active*

CLOSED: *Inactive*

SPONS-ACT: *Active*

You can set up institution statuses for sponsoring organizations and set their institution status to *Active* throughout the educational career of the student.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Institution Status

Additional Notes and Business Rules

Default: The default value of the system institution status is *Active*.

Status: Status can be closed to prevent further use for any new institutions. If an institution status has not been used when creating institution details, it can be closed.

8.3.4 Organizational Structure Data Setup - Institution Crosswalk Tab IGSOR032

The Institution Crosswalk tab displays information entered into Oracle Student System by the previous Import Crosswalk Institutions concurrent process. This is a display-only tab and is used to compare IDs and institution codes between external systems and Oracle Student Systems.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Institution Crosswalk

8.3.5 Setting Up Institutions IGSOR029

To set up your institution, enter the Institution name and Institution code then make your selections from the values you have defined. These codes, types, and statuses populate lists of values in the Institutions window.

Prerequisites

Institution statuses are set up.

Organizational structure alternate ID types are set up.

Institution types are set up.

Institution control types are set up.

Government institution codes are optionally set up.

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the **Globe** icon and expand Institutions

Select your institution and click **Institution Details**

To add a new institution, right click your mouse and select **Add Institution**.

Additional Notes and Business Rules

Generate Institution Codes:

- **Automatically:** Set the **HZ: Generate Party Number** profile option to **Yes**.
- **Manually:** Set the **HZ: Generate Party Number** profile option to **No**.

Local Institution field: Limited to one institution and used for reporting purposes only.

SEVIS: You must enter a SEVIS ID in this window as part of Oracle Student System configuration for SEVIS reporting.

UK Specific: All external bodies, examination boards, schools, colleges, universities and other institutions previously attended by students and other institutions

providing teaching on programs run by the institution, must be set up as institutions in Oracle Student System. Note the following:

- The HESA HE Institution identifiers must be set up as the government institution code. For higher education institutions that are reported to HESA, this includes other institutions providing teaching.
- An alternative ID type of HESA_INST is required. The HESA_INST codes must be valid HESA previous institution codes. If defined as the codes provided by UCAS in the *J file and transactions, the previous institution attended can be updated from the UCAS data.
- At least 1 organizational unit must also be set up for other institutions providing teaching.

CAUTION:

- Changing an institution status also changes its system status from *Active* to *Inactive*, and all active dependent organizational units also change.
- You cannot alter an institution code.
- Institutions cannot be deleted, but the institution status for an institution can be set to *Inactive*.

8.3.5.1 Setting Up Addresses

You can enter addresses for institution, contacts and other entities here.

If institution addresses are not entered, the institutions will not appear in the lists of values in the self-service pages.

Prerequisites

Institutions are set up.

Oracle Receivables is set up.

Navigation

Institutions > Address

Additional Notes and Business Rules

Dependencies: Values for the following fields are dependent on country and validations set up in Oracle Receivables:

- City

- **State**
- **County**
- **Country**
- **Postal or Zip Code**

Required fields: You must enter phone and email data for each address.

End dates: If an end date is entered, the address is valid for the time period between the start and end dates.

Multiple uses: An address can be assigned multiple uses such as Bill-To, Postal, or Home.

8.3.5.2 Setting Up Institution Contacts

Enter institutional contact information.

Prerequisites

Institutions are set up.

Navigation

Institutions > Contacts

Additional Notes and Business Rules

Contact telephone details: You cannot delete contact telephone details. If this information is incorrectly entered or has changed, you must make the record inactive or close it. You can enter multiple telephone numbers for a single contact name.

8.3.5.3 Setting Up Alternate IDs

Enter institution or organizational unit identifiers assigned by external agencies. For example, the College Scholarship Service (CSS) issues numbers to institutions to facilitate Financial Aid processing. This externally issued number is entered into Oracle Student System as an alternate identifier.

Prerequisites

Institutions are set up.

Organizational structure alternate ID types are set up.

Organizational units are set up.

Navigation

Institutions > Identifier

Additional Notes and Business Rules

UK Note: If the DFES/Scottish/Welsh/ Northern Irish official school numbers are to be used for reporting the previous attended to HESA, these codes, preceded with the letter **D** should be set up as an alternate institution identifier that has the system ID type of **HESA Institution Identifier**.

Start and end dates: The HESA extraction process returns the alternate identifier that is active during the HESA reporting period. If more than one alternate ID type with system ID type HESA Institution Identifier is defined for an institution, you must ensure that the start and end dates do not overlap to ensure that the correct code is returned.

8.3.5.4 Setting Up Accreditation Details

Enter statuses and start dates for accreditation agencies. Accreditation statuses are set up in the OR_ACCR_STATUS lookup.

The same agencies accredit institutions and organizational units. An institution may be accredited in its entirety or by organizational unit such as law or medical school.

Accreditation agencies are set up in the Institutions window.

Prerequisites

Institutions are set up.

Organizational structure alternate ID types are set up.

Organizational units are set up.

Navigation

Institutions > Accreditation

Additional Notes and Business Rules

Create institution: An accreditation agency must be created as an institution. After you create it, you cannot modify it.

Start date: The value for the accreditation agency start date must be later than the organization start date.

Status and Agency Combination: A combination of status and accreditation agency must be unique over a date range.

8.3.5.5 Setting Up Secondary Schools

Enter descriptive data if the institution is a secondary school.

Prerequisites

Institutions are set up.

Navigation

Institutions > Secondary Schools

8.3.5.6 Reviewing Institution History

View the history of changes to institution details.

Prerequisites

Institutions are set up.

Navigation

Institutions > History

8.3.5.7 Setting Up Institution Statistics

Enter institution statistics for a specific year, such as the percentage of graduates who continue on to higher education from a particular graduating class.

Institution statistic types are set up in the **OR_INST_STAT_TYPE** lookup.

Navigation

Institutions > Statistics

8.3.5.8 Setting Up Institution Notes

Enter comments or descriptive text. The list of values for the **Note Type Description** field is populated by the values entered during organizational structure note types setup.

Prerequisites

Institutions are set up.

Organizational structure note types are set up.

Navigation

Institutions > Notes

8.4 Locations

Location data is information that describes the physical location of institutions, buildings, rooms, and venues.

8.4.1 Locations Lookups

You can create user-defined regions for locations. These user-defined regions populate the list of values in the Region field of the Locations window.

Navigation

Setups > Lookups

Additional Notes and Business Rules

Type field: Enter user-defined codes for the IGS_OR_LOC_REGION lookup:

8.4.2 Location Type Organizational Structure - Location Type Tab IGSOR032

A location type is assigned to each site to classify its use and enable grouping of locations. User-defined location types are mapped to system location types of *Campus*, *Exam Center*, and *Graduation Center*.

Campus: *Campus*

Study Center: *Exam Center*

Graduation Hall: *Graduation Center*

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Location Type

8.4.3 Setting Up Location Details IGSOR031

Enter addresses and notes to describe the location of institutions, venues, buildings, and rooms.

Prerequisites

Location types are set up.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup

Expand Locations after selecting the **Globe** icon.

Select your location and click **Location Details**.

Additional Notes and Business Rules

Create a new location: To create a new location, right click your mouse and select Add Location from the menu.

Delete a location: If a location has been used elsewhere in Oracle Student System, it cannot be deleted.

Location Coordinator: The location coordinator must have a person type of **Staff**.

8.4.3.1 Setting Up Location Addresses

Enter addresses, use, and contact details for locations.

Prerequisites

Locations are set up.

Oracle Receivables is set up.

Navigation

Locations Details > Address

Additional Notes and Business Rules

Field values: Values for the following fields are dependent on country and validations set up in Oracle Receivables:

- City
- State

- **Country**
- **County**
- **Postal or Zip Code**

Additional data: You may enter phone and email data for each address.

End date: If an end date is entered, the address is valid for the time period between the start and end dates.

Multiple uses: An address can be assigned multiple uses such as Bill-To, Postal, or Home.

8.4.3.2 Setting Up Regions

Use region codes to assign a preferred region to unit section occurrences for scheduling purposes.

The preferred region is passed from Oracle Student System using the scheduling interface to the third party scheduling software that assigns building and room within this region. This information is then transferred back into Oracle Student System using the scheduling interface.

Prerequisites

Locations are set up.

Region codes are set up.

Third party scheduling software is installed and set up.

Navigation

Locations Details > Region

Additional Notes and Business Rules

Region setup: Region setup must be the same as the setup for the third party scheduling software.

8.4.3.3 Setting Up Phone and Email Information

Enter telephone number and email address for a location.

Prerequisites

Locations are set up.

Addresses are set up.

Navigation

Locations Details > Address > Contacts

8.4.3.4 Setting Up Location Notes

Enter comments or descriptive text about locations. The list of values for the Note Type Description field is populated by the values entered during organizational structure note types setup.

Prerequisites

Locations are set up.

Organizational structure note types are set up.

Navigation

Locations Details > Notes

8.4.4 Setting Up Location Relationships IGSOR012

Location relationships allow you to build hierarchies within locations. For example, the Main Campus (owning location) can have multiple satellite campuses (sub locations).

Default graduation and examination locations can be set for each campus location. These default locations are used by both the Graduation and Assessment subsystems when you allocate graduands to ceremonies and determine default exam locations for student unit attempts.

Prerequisites

Locations are set up.

Navigation

Setups > Organizational Structure > Location Relationships

Additional Notes and Business Rules

CAUTION:

- **Changes to location relationships:** Changes to location relationships can affect the ability to inquire or report on related or previously reported groups of locations.
- **Changing the graduation or examination relationship:** Changing the graduation or examination relationship, including the setting of the default check box, affects future automatic allocation of graduands or students to graduation or examination venues.

Default: Only a single sub location of a specified location type can be set as the default.

8.4.5 Setting Up Buildings IGSPS098

Enter a user-defined building code and description to enter buildings and associate them with locations. For example, enter FH as a building code for Fonseca Hall.

Prerequisites

Locations are set up.

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the **Globe** icon and expand Locations

Expand your location and expand your venue locations

Select **Buildings/Rooms** and expand your building

Select your building

Additional Notes and Business Rules

Unique codes: Each building must be assigned a location code and building code combination.

Deleting or Closing a Building: A building cannot be deleted if rooms have been defined for that building. If a building is closed, all rooms in the building are closed.

Create a new building: For a new building, right click your mouse for a menu and select Add Building.

8.4.6 Setting Up Rooms IGSPS099

Enter a user-defined room code and description to enter rooms and associate them with locations. For example, enter 123 as a room code for a room within Fonseca Hall.

Enter additional room details such as primary use and capacity. The Primary Use list of values comes from the system lookup type **PRIMARY_USE**.

Prerequisites

Buildings are set up.

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the **Globe** icon and expand Locations

Expand your location and expand your venue locations

Select **Buildings/Rooms** and expand your building

Select your building

Select your room

Additional Notes and Business Rules

Create a new room: For a new room, right click your mouse for a menu and select Add Room.

Unique codes: The room code, building code, and location code combination must be unique.

Deletion: A room code cannot be deleted if that room is mapped to a unit section.

8.5 Organizational Unit

Organizational units are user-defined divisions within institutions such as schools, departments, branches, and institutes.

8.5.1 Organizational Unit Lookups

Create user-defined codes to be used throughout Oracle Student System.

Navigation

Setups > Lookups

Additional Notes and Business Rules

Query the lookup type and enter user-defined codes for each lookup:

- **OR_ORG_TYPE Organization Type:** Type of organization (academic, administrative, external agency, agent, external, internal, support)
- **OR_MEMBER_TYPE Organization Member Type:** Further classification for organizational units if required.
- **OR_ACCR_STATUS Accreditation status:** Further accreditation statuses

8.5.2 Setting Up Organizational Statuses - Organization Status Tab IGSOR032

Create user-defined organizational statuses to describe whether or not an organizational unit is considered active or inactive. Examples of organizational statuses include CURRENT, INACTIVE, AND SPONS-ACT.

This user-defined organizational status is mapped to system organization statuses of Active and Inactive.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup > Organizational Status

Additional Notes and Business Rules

Default: When a new organizational status is entered, the system organizational status defaults to Active.

Changes:

- **System organizational status:** If an organizational status has been assigned to one or more organizational units, then its system organizational status cannot be changed.
- **Modification of organizational status definition:** If an organizational status has been used in the definition of an organizational unit, then its description can be modified only if the change is minor and does not alter the meaning.

8.5.3 Setting Up Organizational Units IGSOR030

Set up your organizational units by making selections from the values you defined in the Organization Structure Data Setup window. These codes and statuses populate lists of values in the Organizational Units window.

Prerequisites

Member types are set up.

Organizational types are set up.

Organization unit statuses are set up.

Institutions are set up.

Organizational structure alternate ID types are optionally set up.

Navigation

Setups > Organizational Structure > Organization Structure Data Setup window

Expand Institutions

Select your institution and expand your institution.

Select your organizational unit and click **Organization Details**.

Additional Notes and Business Rules

Create new organizational units: For new organizational units, right click your mouse and select Add Organization.

Generate Organizational Unit Codes:

- **Automatically:** Set the **HZ: Generate Party Number** profile option to **Yes**.
- **Manually:** Set the **HZ: Generate Party Number** profile option to **No**.

End dates: An end date can be saved only if the unit's system status is **Inactive**, and it must be the same as the current date or earlier.

UK Note: Other institutions providing teaching reported to HESA are set up as Oracle Student System organizational units.

CAUTION:

Propagating and reversing changes: If a change to the organizational status results in its system status changing from **Active** to **Inactive**, and the organizational unit

has active child units, an error message advises that the change cannot be made. Click **OK** in the error message.

A second message appears giving users the option to propagate the changed status to all child records. The propagate function changes the status of each child unit to mirror the parent unit's status. Clicking **Cancel** stops the propagation process, and the dependent organizational units are not changed.

If a propagation process is carried out, but it is decided later to reverse the changes, the organizational status is changed to a system status of **Active**. This status reversal does not propagate to dependent organizational units. Each child unit status must be changed individually.

The propagation process does not succeed if an organizational unit in the propagation has other active parent organizational units or if the end date being propagated is before the start date of a child record.

8.5.3.1 Setting Up Addresses

Enter addresses, use, and contact details for organizational units.

Prerequisites

Organization units are set up.

Institutions are set up.

Oracle Receivables address validation is set up.

Navigation

Organization Unit Details > Address

Additional Notes and Business Rules

Valid values: Values for the following fields are dependent on country and validations set up in Oracle Receivables:

- City
- State
- Country
- County
- Postal or Zip Code

Required fields: You must enter phone and email data for each address.

End dates: If an end date is entered, the address is valid for the time period between the start and end dates.

Multiple uses: An address can be assigned multiple uses such as Bill-To, Postal, or Home.

8.5.3.2 Setting Up Contact Information

Enter contact person, telephone, address, reference and email address for internal and external organizational units.

Prerequisites

Institutions are set up.

Organization units are set up.

Addresses are set up.

Navigation

Organization Unit Details > Address > Contacts

8.5.3.3 Setting Up Organizational Unit Location

An organizational unit location is a physical site associated with an organizational unit.

Prerequisites

Institutions are set up.

Organization units are set up.

Locations are set up.

Navigation

Organization Unit Details > Locations

Additional Notes and Business Rules

Locations: An organizational unit can be located at one or more physical locations.

8.5.3.4 Setting Up Alternate IDs

Enter alternate IDs for organizational units.

Prerequisites

Institutions are set up.

Organization units are set up.

Organizational structure alternate ID types are set up.

Navigation

Organization Unit Details > Identifier

8.5.3.5 Setting Up Organizational Structure Accreditation Details

Each organizational unit can be accredited by one or more accreditation agencies. Institutions as a whole or individual organizational units can be accredited.

Enter statuses and start dates for accreditation agencies. Accreditation statuses are set up in the **OR_ACCR_STATUS** lookup.

Prerequisites

Institutions are set up.

Organization units are set up.

Accreditation statuses are set up.

Navigation

Organization Unit Details > Identifier

Additional Notes and Business Rules

Accreditation agency: An accreditation agency must be created as an institution. After you create it, you cannot modify it.

Start date: The value for the accreditation agency start date must be later than the organization start date.

Date range: A combination of status and accreditation agency must be unique over a date range. An organizational unit cannot be accredited and not accredited at the same time.

8.5.3.6 Reviewing Organizational Unit History

View the history of changes to an organizational unit code.

Prerequisites

Institutions are set up.

Organization units are set up.

Navigation

Organization Unit Details > History

8.5.3.7 Setting Up Organizational Structure Notes

Enter comments or descriptive text about organizational units. The list of values for the Note Type Description field is populated by the values entered during organizational structure note types setup.

Prerequisites

Institutions are set up.

Organization units are set up.

Organizational structure note types are set up.

Navigation

Organization Unit Details > Notes

8.5.4 Setting Up Organizational Unit Relationships IGSOR015

You can build relationships among organizational units. For example, the School of Business organizational unit is a child of Anywhere University. The School of Business as a parent organizational unit is comprised of multiple child organizational units including the Departments of Marketing, Accounting, and Organizational Behavior.

Prerequisites

Organizational units are set up.

Organizational unit locations are set up.

Navigation

Setup > Organizational Structure > Organization Unit Relationships

Additional Notes and Business Rules

Changes: Changes to organizational unit relationships can affect the ability to inquire or report on groups of related organizational units.

Active organizational units: Organizational unit relationships must be created with active organizational units. If the context organizational unit is active, one parent or child unit must be active.

Deletion: The record is logically rather than physically deleted to permit later inquiry on former relationships. The current date is automatically inserted as the deletion date. An organizational unit cannot have a relationship to itself. However, a logically deleted parent record can be made as child and vice versa.

8.6 Functional Filter

The function filter allows you to narrow choices for institutions and organizational units. You can set up windows to display either organizational unit data or institution data.

8.6.1 Organization Structure Data Setup - Function Filter Tab IGSOR032

Several Oracle Student System windows, represented in this tab by function name, can be configured by logical attributes available in institutions and organizational units.

When you select the seeded function name to filter, Oracle Student System determines if the function uses organizational unit or institution data.

In the **Attribute Type** field, you can choose to limit the choices that appear in the list of values in the window associated with the function as follows:

- **Organizational unit function:** Organization Member Type or Organization Type
- **Institution function:** Institution Control Type or Institution Type

When you make your selection, your choices are automatically narrowed again based on the setup you have completed for the organizational structure lookups.

Note: This is optional setup. If the organizational structure filter configuration has not been established for a particular function, then all organizational units or institutions will appear in the list of values for a particular function.

Navigation

Setup > Organizational Structure > Organizational Structure Data Setup > Function Filter

8.7 Venues

Venues are physical sites created for hosting exams and graduations. Set up the location as **Exam** or **Graduation**. You will enter the details when you create the venue.

8.7.1 Setting Up Venues IGSAS017

Create venues and enter information about the physical sites for exam and graduation locations.

Prerequisites

Person details are set up.

Locations are set up.

Navigation

Setups > Organizational Structure > Organizational Structure Setup

Select the **Globe** icon and expand Locations

Expand your location and expand your venue locations

Select Venue

Additional Notes and Business Rules

Creating a new venue: For a new venue, right click your mouse for a menu and select Add Venue.

Unique codes: Entering a unique venue code creates a new record. A venue associated with a graduation location does not require a supervisor limit or priority code to be entered. Venue codes can be created only for locations with a system location type of **EXAMP-CTR** or **GRD-CTR**.

Valid values: Values for the following fields are dependent on country and validations set up in Oracle Receivables:

- City

- **State**
- **County**
- **Country**
- **Postal or Zip Code**

Supervisor limit: The supervisor limit indicates the maximum number of supervisors required for a venue and is used in the Supervisors to Venue window to validate the number of supervisors assigned to a venue within a session.

Priority code: The priority code indicates the order of preference for venues in cases in which more than one venue is available for the examination location. No automated functionality is associated with this value.

Number of seats: The value in the **Number of Seats** field is used by the examination timetabling system to allocate students to venues.

Exam coordinator: The exam coordinator must have a person type of **Staff**.

Closed venue code: A closed venue code cannot be reopened if the location is closed.

System Wide Services: Tracking

9.1 Tracking

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

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

Each item being monitored is called a **tracking item**. Tracking items can be manually recorded or started by processes within other subsystems. A **tracking type** is the set of requirements a tracking item must be associated with a person. After the appropriate definition of requirements sets is established as tracking types, they can be associated with people through a tracking item. For example, the Admissions subsystem maps predefined tracking types to applicants based on the admissions process category combined with the use of rules to distinguish unique requirements based on applicant characteristics.

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

Data that is imported into Oracle Student System through Test Scores, Application Personal Statement, or Credentials can be linked to a tracking step and marked as complete by running the concurrent process to update a tracking step.

Admissions System Tracking Items

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 Tracking Items

Manually-assessed advanced standing applications can be tracked through the approval process.

Assessments Tracking Items

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 Items

Tracking thesis examinations and thesis panel members.

Terminology

A **tracking item** is a document or process monitored by the Tracking windows.

A **tracking type** is a user-defined type that identifies and classifies items being tracked, which are mapped to system 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. You have the option of creating a tracking step catalog.

A **step group** is a group of steps linked together. If two or more steps share the same step group number, then a group limit can be set where only one of the steps needs to be completed to satisfy the requirement. Not all the steps in the group need to be completed for the Tracking Item to be completed.

9.1.1 Setting Up Tracking Statuses IGSTR003

Enter user-defined tracking statuses in the Tracking Status window and map them to system tracking statuses:

- **Active:** indicating the tracking item is started and is in progress
- **Cancelled:** indicating the tracking item was terminated by the tracking item originator before all steps were completed. The system sets any tracking incomplete steps to BYPASSED status.
- **Complete:** indicating all tracking item steps are complete or bypassed

Tracking statuses are applied to both tracking items and tracking groups to indicate the current state of activity.

Navigation

Person Reference > Tracking > Status > Status

9.1.2 Setting Up Tracking Step Catalog IGSTR011

A tracking step catalog is a group of tracking steps. The catalog prevents the creation of duplicate steps for the same process and facilitates easy usage. A step catalog is mapped to one or more system tracking types.

You can assign the system tracking step type to multiple system tracking types. For each system tracking step type in the catalog, you can have multiple system tracking types. However, you can attach a system tracking step type only to system tracking types that have the relevant functionality to process the step. Relevant functionality is determined by seeded lookups that are system defined. The system tracking step types are seeded as lookups in lookup type **TRACKING_STEP_TYPE**. To determine which system tracking type you can attach, there is another lookup. For example, you can attach a system tracking step type of credential only to a system tracking type of either Admission Processing or Post Admission.

This provides different subsystems in Oracle Student System the flexibility to assign tracking steps to specific functionality within them.

If a tracking step is not predefined in the step catalog, it can still be defined as an additional step in any tracking type or item. To prevent duplicate steps being created for the same purpose, you can have a predefined collection of tracking steps. When any two tracking steps have the same system step type, each step receives the same treatment since Oracle Student System processes system values that are already identified.

Navigation

Person Reference > Tracking > Step Catalog

Additional Notes and Business Rules

Step Catalog Code: This field is the code identifier for a step catalog.

System Tracking Step Type: Valid values for this field include seeded mappings between system tracking type and system tracking step type. If there is only one mapping between system tracking type and system tracking step type, then the system tracking type is defaulted into the field. After the value is mapped to the Tracking Step Catalog, it may not be mapped as a duplicate to the same Tracking Step Catalog.

Action Days: This field indicates the number of days to complete the tracking step catalog.

Publish: If selected, then published steps and the specified item in self-service are displayed. If not selected, then neither the tracking item nor any of its steps are displayed in self-service.

System Tracking Type: The list of values for this field contains system tracking types that represent specific processes in Oracle Student System such as admission processing, post-admission processing, research, and assessment.

Updating: You cannot update a system tracking step type for a step catalog.

Mapping: A step catalog code must have at least one system tracking type attached. You can attach more than one system tracking types to a step catalog. You can attach a system tracking type to a step catalog only once. A mapping between the Step Catalog and System Tracking Type can be closed.

9.1.3 Setting Up Tracking Note Types IGSTR004

Categorize user-defined tracking note types in the Tracking Note Types window. Note types can represent:

- **Purpose:** for notes describing the purpose of a tracking step
- **Support:** for notes describing documentation received in support of a tracking item
- **Comment:** for notes describing the performance of a tracking step

Navigation

Person Reference > Tracking > Note Types > Note Types

9.1.4 Setting Up Tracking Types IGSTR001

Map each user-defined tracking type to a system tracking type. Individual items or processes are monitored through steps defined for their corresponding tracking type. A tracking type and its associated tracking steps are used as starting points when creating tracking items.

All system tracking types, except for undefined tracking types, are associated with built-in system processes. For example, the system tracking type assignment is linked to user-defined tracking types and are used by Assessments to monitor the movement of assignments.

System tracking types include:

- Administrative
- Admission Processing
- Assignment
- Post Admission
- Research Thesis Examination Tracking Item
- Research Thesis Panel Member Tracking Item

Tracking types can be used by an institution to predefine a set of required steps for a given process. Depending on the subsystem, these required steps can be used for different purposes. For example, Admissions defines different tracking types for each category of the admission process applying to undergraduate, degree seeking, early decision, and special programs.

Enter a number of target days must for each tracking type. Target days represent the time needed to complete a particular tracking item. The system uses target days to calculate the value of the Completion Required By date field for a tracking item.

Tracking types can be set to use either business days or calendar days in date calculations.

The process for tracking items of a particular tracking type is defined by tracking type steps. Tracking type steps are assigned to a tracking type in the Tracking Types window and are associated with tracking items that belong to that type when the items are created in the Tracking Items window. The number of action days recorded with each tracking type step is used to calculate the action date of the tracking item step. Steps can be completed sequentially or nonsequentially.

Each step can have a recipient associated with it. The recipient identifies the person responsible for performing the step and is optional. A default recipient can be

created for each tracking type step. The default recipient can be overridden in the Tracking Items window. Notes can be recorded for a tracking type step using the Tracking Item Notes window.

Prerequisites

Tracking note types are set up.

Navigation

Person Reference > Tracking > Types > Tracking Types

Additional Notes and Business Rules

Target Days: This field indicates the maximum number of days required to complete all steps and used in conjunction with the **Business Days Only** check box to calculate the completion required by date for an item.

Business Days Only: If selected, then Oracle Student System calculates tracking item completion dates based on business days only.

Publish: If selected, then published steps and the specified item are displayed in self-service. If not selected, then neither the tracking item nor any of its steps are displayed in self-service.

Sequential: If selected, then Oracle Student System determines whether an item's tracking steps must be completed in sequence, and whether calculated action dates for tracking steps are progressive.

Step: This field represents an activity required to process a tracking item and identified by a system generated number. The number represents an imposed order for step completion when the **Sequential** check box is selected. If the **Sequential** check box is not selected, tracking steps can be completed in any order.

Catalog Code: This field is the code used when populating steps for Tracking Types. Valid values include step catalogs that match the system tracking type.

Step Group ID: This field is a numeric value to identify steps belonging to a group. For example, if the tracking type has the following steps: Step 1 SAT Test, Step 2 ACT Test, and Step 3 TOEFL Test, then the Step Group ID for these 3 steps can be uniquely identified with Step Group ID of 1.

Action Days: This field specifies the normal maximum number of days to complete a tracking step for tracking items in conjunction with **Sequential** and **Business Days Only** check boxes.

Recipient: This field is person number and name to whom the tracking item is sent for a particular step.

Check boxes: If the **Publish Step** check box is selected and the **Publish** check box is selected for the tracking type, then the tracking step is displayed in self-service.

Maximum number of steps: Assign a value to indicate the maximum number of steps to be completed for a step group in the Step Group Limits window.

9.1.5 Setting Up Tracking Type Step Notes IGSTR002

Enter notes for tracking type steps. These notes can contain reasons for the existence of the step or reasons for the specification of a particular recipient.

Navigation

Person Reference > Tracking > Types

System Wide Services: Correspondence

Correspondence functionality uses Oracle Student System and Oracle Customer Relationship Management products and technology to create correspondence letters.

Oracle One-to-One Fulfillment and Oracle Customer Interaction History provide features and tools to set up and send correspondence letters. Recruiters can communicate to prospective and current students using these system-generated and ad-hoc letters.

10.1 Setting Up Letters in Oracle One-to-One Fulfillment

Correspondence letters are created in Oracle One-to-One Fulfillment. Correspondence is an integral part of interactions with students. E-mail delivery functionality available with the setup of Oracle One-to-One Fulfillment.

You can define complex documents by including text placeholders in the document. These placeholders are replaced by data or information extracted from Oracle Student System tables through a SQL query defined in Oracle One-to-One Fulfillment and attached to letters.

A SQL query is a statement that collects specific data from the database when fulfilling a request to send a document.

Prerequisites

For 11.5.9 customers, you must migrate your data from MES tables to OCM tables.

Oracle One-to-One Fulfillment servers are set and running.

See *Oracle Fulfillment Services Implementation Guide* for information about setting up Oracle One-to-One Fulfillment.

See *Oracle Fulfillment Services Users Guide* for information about creating letters, attachments, and queries.

Oracle Content Manager is installed.

Responsibility

Oracle Fulfillment Administrator

Additional Notes and Business Rules

Create the following letters as described in the following table.

Table 10–1 Correspondence Letters

Admissions Letters	Financial Aid Letters	Ad Hoc Letters	UK Letters
Acknowledgement Letter	Financial Aid Award Notification Letter	Admissions Ad Hoc Letter	Admission Interview Details Letter
Admissions Acceptance Letter	Financial Aid Missing Item Letter	Financial Aid Ad Hoc Letter	Admission Admit No Response Letter
Admit to Future Term Letter	Financial Aid Loan Disbursements Letter	Student Finance Ad Hoc Letter	NA
Conditional Offer Letter	NA	Enrollment Ad Hoc Letter	NA
Future Term Second Admission Letter	NA	Generic Ad Hoc Letter	NA
Admission Missing Items Letter	NA	NA	NA
No-Quota Letter	NA	NA	NA
Post Admission Missing Items Letter	NA	NA	NA
Rejection Letter	NA	NA	NA
Residency Letter	NA	NA	NA
Waitlist Letter	NA	NA	NA

List queries: Do not set up Financial Aid letters using list queries. You cannot use list queries to run Financial Aid correspondence concurrent processes in Oracle Student System.

Dynamic person ID groups: You can create dynamic person ID groups and send letters to those groups.

See *Oracle Student System User Guide* for information about running concurrent requests to produce letters in Oracle Student System.

See Chapter 6, "System Wide Services: Person" for information about setting up dynamic person ID groups.

10.2 Setting Up Printing and Faxing Functionality

Correspondence items are requested using an Oracle Student System concurrent process and printed by One-to-One Fulfillment using a third party tool (RightFAX).

RightFAX, provided by Captaris, is a comprehensive network fax/print solution for sending and managing faxes and print jobs directly from user desktops.

The Correspondence Printer Name profile option, IGS: Printer Destination Name, must be set to the printer name in order to print correspondence on a specified printer. This profile option allows individual users to control the printer on which their letters are printed. You must provide the same printer name that you set during RightFax server setup.

The Correspondence Fax profile option, IGS: Fax Destination Number, must be set to the fax number in order to send correspondence to a specified fax machine. You can override this fax number by entering a different fax number in the Parameters window when running the concurrent processes. When you are defining a fax number, enter the number for an outside line and the international country code.

Prerequisites

RightFAX 8.0 or higher is installed and setup is complete before using **Print** as one of the options in selection criteria.

See the latest published documentation for RightFAX version 8.0 or higher to ensure correct installation.

Responsibility

System Administrator

Navigation

Profile > System

Additional Notes and Business Rules

Profile option: Set the IGS: Delivery Destination Name profile option value to the name of the RightFax printers. The system administrator can set this profile option at the Site level, and you can change the value of this option at either the Responsibility or User level according to your needs.

See Appendix B, "Oracle Student System Profile Options" for detailed information about profile options.

10.3 Setting Up Oracle Student System Profile Options

Two additional profile options must be set in Oracle Student System to complete the integration.

Set the IGS: Fulfillment Server ID profile option to select the server on which you want to run Oracle One-to-One Fulfillment. Set the IGS: CRM User ID profile option to identify Correspondence users at your institution.

Prerequisites

Oracle One-to-One Fulfillment server is set and running to enable Correspondence functionality.

Oracle One-to-One Fulfillment setup is complete.

Navigation

Profile > System

Additional Notes and Business Rules

Profile option: In order to run correspondence concurrent processes, the user that you enter in the IGS: CRM User ID profile option must have Sales and Marketing resources associated with him or her. If you enter a value in the IGS: CRM User ID profile option for a user who does not have Sales and Marketing resources, then that person cannot run correspondence concurrent processes. This is true if the Audit Level profile option is set to a value other than **None**.

User value: Set the user value to **signon**, **sign on**, or the user that you enter in the IGS: CRM User ID profile option. You can set the Audit Level profile option at the user level and create separate users for running correspondence concurrent requests.

See Appendix B, "Oracle Student System Profile Options" for detailed information about profile options.

10.4 Setting Up Mapping and Attributes IGSCO014

The master documents used for correspondence and the recipient list are created in Oracle One-to-One Fulfillment.

The Master documents defined in Oracle One-to-One Fulfillment are mapped to system letter codes in Oracle Student System. System letter codes are predefined, and each code has its own specific functionality.

The document types can be system letter or ad hoc. This mapping ensures that documents belonging to the specified system letter code is displayed as an option when a concurrent process is run.

The description you provide here becomes the subject line in the email that you send as correspondence.

You can also assign attributes to these documents. For example, attributes can be number of times a letter can be sent and elapsed days before which users can resend the letter. These attributes can be overridden by selecting Yes in Override parameter in concurrent process.

Prerequisites

Correspondence letters are created in Oracle One-to-One Fulfillment

Navigation

Correspondence > Mapping and Attributes

Additional Notes and Business Rules

Mapping Type: Master document or a list of people to whom correspondence is sent. If mapping type is List, users cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.

Document Type: System letter or ad hoc letter. System letters can be acknowledgement letters, rejection letters with a student recipient list attached. Ad hoc letters can be brochures, newsletters, prospectus, or other customer-related information.

Document/List Name: Document or recipient list name. If mapping type is document, list of values displays only document names. If mapping type is list, list of values displays only recipient list names.

System Letter Code: Oracle Student System system letter code to which document is mapped. If system letter code is Financial Aid type, users cannot enter number of repeats, elapsed days, and attribute description in the Attributes region.

Mapping Description: Description of mapping; useful when, for example, users want to differentiate between two acknowledgement letters. This becomes the subject line of your email if mapping type is Document type mapping.

Elapsed Days: Number of elapsed days before which users can resend the document; disabled for List mapping and Financial Aid letter mapping. You can override the number of elapsed days if the Override Flag in the concurrent process is set to Yes.

Number of Repeats: Number of times you can resend the document.

System letter codes:

- **SFADHOC:** Student Finance Ad-Hoc Letter
- **ADADHOC:** Admissions Ad-Hoc Letter
- **ENADHOC:** Enrollment Ad-Hoc Letter
- **FAADHOC:** Financial Aid Ad-Hoc Letter
- **GENERIC:** Generic Ad-Hoc Letter
- **ADACCEP:** Admissions Acceptance Letter
- **ADACKMT:** Acknowledgement Letter
- **ADCONOF:** Conditional Offer Letter
- **ADFUTSE:** Admit to Future Term Letter
- **ADMFTSA:** Future Term Second Admission Letter
- **ADMISTM:** Missing Items Letter
- **ADNOQUT:** No-Quota Letter
- **ADPADMS:** Post Admission Missing Items Letter
- **ADREJEC:** Rejection Letter
- **ADRESID:** Residency Letter
- **ADWAITL:** Waitlist Letter
- **FAAWARD:** Financial Aid Award Notification Letter
- **FADISBT:** Financial Aid Loan Disbursements Letter
- **FAMISTM:** Financial Aid Missing Item Letter
- **ADINTRW:** Admission Interview Details Letter

- **ADNORSP:** Admission Admit No Response Letter

10.4.1 Viewing Collateral and Attachments IGSCO014

Collateral and attachments are created and added in Oracle One-to-One Fulfillment using OCM Attachments and OCM Email Deliverables. You can view the collateral and attachments mapped to a correspondence letter in the Collateral and Attachments window in Oracle Student System.

Prerequisites

Letters are created in Oracle One-to-One Fulfillment

Collateral and attachments are created in Oracle One-to-One Fulfillment using Oracle Content Manager attachments and Oracle Content Manager email deliverables.

Navigation

Correspondence > Mapping and Attributes > View Attachments

10.4.2 Sending Test Mail IGSCO014

Send a test mail to ensure that you have set up the correspondence letter correctly. While sending test mail, you must provide an email address and description for subject line. Test mail does not replace merge fields with actual data values. This is just test mail and this will not be stored for future reference. Mapping Record must be saved to enable Send Test Mail.

Prerequisites

Letters are created in Oracle One-to-One Fulfillment.

Mapping records are saved to enable Send Test Mail.

Navigation

Correspondence > Mapping and Attributes > Send Test Mail

Additional Notes and Business Rules

You cannot send a test mail to someone with a **Closed** record.

Student Recruiting

11.1 Overview of Student Recruiting

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

Oracle Student System recruiting functionality consists of the ability to collect detailed information from prospects who submitted admission inquiries. Lead information can be viewed from Oracle Student System, but active recruiting processes (for example, campaigns, changing leads to opportunities, and tracking) can be done only in Oracle Student Recruiting.

Student Recruiting allows you to use sophisticated recruiting management techniques and marketing automation to perform the following functions:

- Segment and manage lists
- Target prospects
- Manage recruiting campaign and event processing
- Manage recruiting costs and budgets
- Manage and track recruiting of prospects through funnel status
- Capture and track prospect information
- Process collateral or request fulfillment
- Manage territory assignments
- Calculate advanced metrics
- Assign and manage tasks

Student Recruiting incorporates two components of the Customer Relationship Management eBusiness suite of products: Oracle Marketing with the Advanced Option, and Oracle TeleSales. Key features of these modules include the following:

- Analytics including metrics, home page bins and reports, summary page information
- Segmentation and list management
- Budget and costs management
- Campaign planning
- Multi-channel campaign execution
- Workflow management
- Product creation and management
- Event logistics and management
- Automated interaction tracking
- Prospect management
- Notes management
- Event registration
- Tasks
- Territory management
- Resource management
- Task management

11.1.1 References

The following documents must be used to set up and use Student Recruiting:

- *Oracle Applications System Administrator's Guide*
- *Oracle Marketing Implementation Guide*
- *Oracle Marketing User Guide*
- *Oracle TeleSales Implementation Guide*
- *Oracle TeleSales User Guide*

11.2 Understanding Oracle Marketing and Student Recruiting

Oracle Marketing provides features for the entire recruiting process from campaign planning, budget management, and list creation to execution, reporting, and analysis. Oracle Marketing allows recruiting representatives to coordinate target audience campaign capability with workflow based approvals. By using a centralized and integrated approach, Oracle Marketing ensures that recruiting activities are on message, on budget, and executed in real time through the most effective communication channels.

Oracle Marketing provides the following capabilities:

- Budget and costs management
- Campaign planning and management
- User-defined market segmentation and target population
- Ability to construct communication campaigns
- Ability to sequence or trigger activities
- Event planning and management
- Collateral and request fulfillment management
- Intelligence and analysis of campaigns and events
- Multi-channel campaign and event execution
- Event registration

11.3 Understanding Oracle TeleSales and Student Recruiting

Oracle TeleSales allows recruiting representatives to review or enter prospect data. It provides a versatile set of tools to manage the recruiting cycle, from prospect management through event registration and collateral fulfillment.

When interacting with prospective students, recruiting representatives can record detailed biographical information about a prospect, including interests, academic history, or military background. Before contacting the prospect, representatives can review prospect information, including campaigns associated with the prospect, events that the prospect has registered for, any collateral requests, prospect interests, institutions attended by the prospect, and specific recruiting team members assigned to the prospect. Such comprehensive information allows recruiting representatives to better prepare and manage their prospect accounts and plan each prospect interaction more effectively.

Oracle TeleSales provides the following capabilities:

- 360 degree view of prospect
- Person and school relationships
- Representative and school relationships
- Prospect and agent representation assignment
- Ability to capture prospect interests at any point in time
- Ability to capture prospect interactions and maintain interaction history
- Collateral and request fulfillment management and history
- Lead management
- Opportunity management

11.4 Setting Up Student Recruiting

Student Recruiting Prerequisites

Setup of Student Recruiting requires setup of the following products:

- Person self-service must be set up.
- Oracle General Ledger, Oracle Human Resource Management Systems, and Oracle Inventory must be set up.
- Oracle Applications System Administration must be set up.
- Oracle Marketing, with the Advanced Option must be set up.
- Oracle TeleSales must be set up.
- Oracle Student System must be set up.

11.5 Implementing Oracle Applications System Administration

To set up Oracle Applications System Administration for Student Recruiting, complete the setup steps as described in the *Oracle Applications System Administrator's Guide*.

The following key components must be defined in System Administration to use Student Recruiting:

- Responsibilities

- Lookup codes
- Profile options

11.5.1 Create New Responsibilities

Create Student Recruiting responsibilities that map to Oracle Marketing and Oracle TeleSales responsibilities. Assign the appropriate menus to each of these responsibilities.

The following table describes sample Student Recruiting responsibilities.

Table 11–1 Student Recruiting Responsibilities

Student Recruiting Responsibility	Oracle Marketing or Oracle TeleSales Responsibility
Recruiting > Marketing	Marketing SuperUser
Recruiting > Marketing Administrator	Marketing Administrator
Recruiting Agent or Recruiting Representative	TeleSales Agent
Recruiting Manager	TeleSales Manager
Recruiting Administrator	TeleSales Administrator
Recruiting Administration	TeleSales Administration

For each Student Recruiting responsibility for Oracle Marketing, set the JTF_DEFAULT_PROFILE_RESPONSIBILITY profile to the new Student Recruiting responsibility ID. The profile determines how you will access self-service. For example, for the Recruiting > Marketing responsibility, the application defaults to the Oracle Marketing SuperUser menu structure even though the Recruiting > Marketing responsibility is used. No profile is required for Oracle TeleSales.

To create new responsibilities, see Defining a Responsibility, Responsibilities Window, and Users Window, *Oracle Applications System Administrator's Guide*.

11.5.2 Define Lookup Codes

Define lookup codes for Student Recruiting. You can configure validation codes that are relevant to your institution practices. Several lookup codes include the following:

- Close reason
- Competitor
- Event facility
- Issue

11.5.2.1 Set Up Close Reason Values

Define values for the **CLOSE_REASON** lookup.

Sample close reasons might include the following:

- Institution Not Interested
- Applied
- Enrolled

11.5.2.2 Set Up Competitor Values

Define values for the **COMPETITOR** lookup.

The competitor lookup is used to identify competing institutions.

11.5.2.3 Set Up Event Facility Values

Define values for the **EVENT_FACILITY_TYPE** lookup.

Configure the type of event facilities used by your institution. These might include Community Centers, College Ballrooms, Auditoriums, High Schools, or Hotels.

11.5.2.4 Set Up Issue Values

Define values for the **ISSUE** lookup.

Record problems related to a prospect opportunity. Issue value examples might include the following:

- Application Information
- Application Documentation

11.5.3 Define Profile Options

Define profile options for Student Recruiting.

For information on setting profile option levels and setting profile option values, see *Overview of Setting User Profiles*, *Oracle Applications System Administrator's Guide*, *Oracle Marketing Implementation Guide*, and *Oracle TeleSales Implementation Guide*.

11.5.3.1 Set Profile Option Levels

Set profile option levels for the following:

- **OTS: Default Party Type**
- **OTS: Default Relationship**
- **OTS: Enable Address Validation**
- **OTS: Interaction Default Outcome**
- **OTS: TeleSales Interaction Enabled**
- **OTS: Max Interaction Displayed**
- **MO: Operating Unit**
- **OS: Opportunity Sales Team Default Role Type**
- **OS: Sales Lead Access Privilege**
- **OS: Sales Opportunity Access Privilege**

The appropriate profile option level depends on your institution's organization structure and how many user organizations intend to use the application. Profile options can usually be set at the following levels:

- Site
- Application
- Responsibility
- User

11.5.3.2 Set Profile Option Values

See Appendix B, "Oracle Student System Profile Options" for information about the profile options.

11.6 Implementing Components

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

Resource Manager
Oracle Territory Manager
Interaction Tracking

11.6.1 Prerequisites

For Student Recruiting, set up the following responsibility:

- CRM Administrator

11.6.2 Implement Resource Manager

Implement Resource Manager and define the following:

- Role types
- Roles
- Resource groups
- Resource teams

11.6.2.1 Define Role Types

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

11.6.2.2 Define Resource Roles

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

11.6.2.3 Define Resource Groups

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

11.6.2.4 Define Resource Teams

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

11.6.3 Implement Oracle Territory Manager

Use Oracle Territory Manager to allow multi-dimensional assignment of tasks and resources within your institution.

You can create territories based on multiple criteria such as postal code, area code, country, or vertical market.

You can use Oracle Territory Manager to perform the following functions:

- Automatically assign recruiters based on availability, expertise, or location
- Create territories by using territory types to identify multiple territories with similar characteristics, for example, school zones or regions
- Restrict access to prospect data

11.6.4 Set Up Interaction Tracking

Set up interaction tracking as follows:

- Implement Oracle Customer Interaction History
- Define outcomes, results, and codes
- Set up interaction types

11.6.4.1 Implement Oracle Customer Interaction History

Implement Oracle Customer Interaction History to capture and log comprehensive details for all prospect interactions across your institution.

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

Oracle Customer Interaction History tracks the following types of data:

- Prospect and agent identification
- Media types
- Contact times and dates
- Oracle Marketing campaigns
- Business activities or inquiries
- Outcomes such as phone interactions or other recorded interactions

11.6.4.2 Define Outcomes, Results, and Codes

Use the following categories to track the outcomes of interactions:

- Outcomes
- Results
- Reasons

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

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

Results are the results of the outcome. For example, a prospect indicates interest in your institution and requests a Viewbook. The result is defined as Viewbook Requested.

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

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

11.6.4.3 Set Up Interaction Types

Set up interaction types. Define values for the **INTERACTION_TYPE** lookup. Interaction types are used to further classify the interaction. Some interaction types could include the following:

- Collateral
- Event Letter
- Inbound Phone Call
- Mailed in Response
- Mail Blast

- Campus Visit
- Campus Reception
- High School Visit

11.7 Implementing Oracle Marketing for Student Recruiting

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

To set up Student Recruiting, you must complete all required setup steps for Oracle Marketing. To set up Oracle Marketing, see the *Oracle Marketing Implementation Guide*.

The following key components should be configured in Oracle Marketing to use Student Recruiting:

- Inquiry statuses
- Budgets
- List
- List import
- Deliverables
- Metrics
- Messages

11.7.1 Enabling Inquiry Statuses

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

- OSS Acknowledge
- OSS Complete
- OSS Registered

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

Prerequisites

Oracle Sales and Oracle Marketing setup must be completed.

Responsibility

Oracle Marketing Super User

Navigation

Navigate to the Login page

Steps

1. Click the **Profile** button at the top of the page.
2. Switch responsibility to Oracle Marketing Super User.
3. Click **Update**.
4. Select the Administration tab.
5. Select the Sales subtab.
6. On the left navigation bar, click Status Code in the Opportunity menu.
7. Enter OSS% in the Status Code field.
8. Click **Search**. You will see the following results:
 - OSS_ACKNOWLEDGE
 - OSS_COMPLETE
 - OSS_REGISTERED
9. Repeat steps 10 through 12 for each status code.
10. Click the link for the result.
11. Select the **Enabled** check box.
12. Click **Update**.

See Also

See Setting Up Inquiry Statuses IGSR003 in Chapter 13, "Inquiry" for more information about inquiry statuses.

11.7.2 Implement Budgets

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

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

To implement budgets, see *Implement Budgets, Oracle Marketing Implementation Guide*.

11.7.3 Implement List

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

You can use sophisticated list management to import, generate, compile, and profile prospect data.

To implement lists, see *Implement List, Oracle Marketing Implementation Guide*.

11.7.4 Implement List Import

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

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

To implement List Import, see *Implement List Import, Oracle Marketing Implementation Guide*.

11.7.5 Implement Deliverables

Create deliverables for collateral items such as a cover letter, housing brochure, or financial aid information.

Oracle Marketing allows you to create and maintain any marketing related deliverables or collateral. You can attach any number of multimedia collateral to a

campaign. Collateral and kits can include actual inventory items that can be fulfilled by the recruiting agent using Oracle TeleSales.

You can bundle multiple collateral kits and personalize promotional pieces by customer segments or channels. For example, you might bundle a cover letter with a view book, or bundle a cover letter with a housing brochure or financial aid and scholarship information.

To implement deliverables, see *Implement Deliverables, Oracle Marketing Implementation Guide*.

11.7.6 Create Metrics

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

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

Note: The Advanced Option of Oracle Marketing is required to use integrated data mining.

To create metrics, see *Creating Metrics, Oracle Marketing Implementation Guide*.

11.7.7 Create Messages

Create messages to associate the vision for your institution to a campaign. You can leverage these messages to attract prospects to their campus.

To create messages, see *The Message Tab, Oracle Marketing User Guide*.

11.8 Implementing Oracle TeleSales for Student Recruiting

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

To set up Student Recruiting, you must complete all required setup steps for Oracle Telesales. To set up Oracle TeleSales, see the *Oracle TeleSales Implementation Guide*.

The following key components should be configured in Oracle TeleSales to use Student Recruiting:

- Relationship management
- Lead status
- Lead rank values
- Lead source
- Lead administration or lead scorecard
- Lead rank mapping
- Sales channels
- Timeframe
- Opportunity management
 - Sales stages and sales methodology
 - Win probabilities
 - Interest types
- Notes and note types
- Interaction tracking and outcomes
- Task types
- Territory management
- Custom tabs

See Also

See the *Oracle TeleSales Implementation Guide* for detailed information.

Responsibilities

Create the following sample responsibilities to map to Oracle TeleSales responsibilities to Student Recruiting.

The following table describes sample responsibilities.

Table 11–2 Sample Oracle Student Recruiting Responsibilities

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

11.8.1 Lookups

Lookup codes for Oracle TeleSales are close reason, competitor, event facility, and issue.

Sample close reason codes might include the following:

- Institution not interested
- Prospect not interested
- Enrolled elsewhere
- Financial
- Deceased
- Applied
- Enrolled

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

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

- Community centers
- College ballrooms
- Auditoriums
- High schools
- Hotels

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

- Application information

Application documentation

Deposit

Financial aid

Institution costs

11.8.2 Set Up Relationships

Set up relationships to capture business, personal, individual to organization, and organization to organization relationships. This provides you with a 360 degree view of an individual prospect.

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

To set up relationships, see *Setting Up Relationships, Oracle TeleSales Implementation Guide*.

11.8.3 Set Up Lead Status

Set up lead statuses to describe the inquiry status of a prospect. Oracle TeleSales provides a set of predefined lead statuses. For recruiting purposes, you can configure the following alternate statuses:

- New
- Inactive
- Prospect
- Active Inquirer

To set up lead statuses, see *Setting Up Lead Status, Oracle TeleSales Implementation Guide*.

11.8.4 Set Up Lead Rank Values

Set up lead rank values. Define values for the RANK_ID lookup. You might set up the following values:

- Not Interested
- Somewhat Interested
- Interested
- Extremely Interested

To set up automatic lead ranking, see *Setting Up Automatic Lead Ranking, Oracle TeleSales Implementation Guide*. For a list of lookups, see *Lookups, Oracle TeleSales Implementation Guide*.

11.8.5 Set Up Lead Source Values

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

- PSAT List
- Purchased List
- Counselor
- Teacher
- Alumni
- Event
- Web
- Email

For a list of lookups, see *Lookups, Oracle TeleSales Implementation Guide*.

11.8.6 Set Up a Lead Scorecard

Set up a lead scorecard.

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

To set up a lead scorecard, see *Setting Up a Lead Scorecard, Oracle TeleSales Implementation Guide*.

11.8.7 Set Up Lead Rank Mapping

Set up lead rank mapping to enter possible scores that the lead score card can assign to leads.

The following table describes sample lead rank mapping values.

Table 11–3 Lead Rank Mapping Values

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

To set up lead rank mapping, see *Setting Up Lead Rank Mapping, Oracle TeleSales Implementation Guide*.

11.8.8 Set Up Sales Channels

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

- High School Visit
- College Fair
- Website
- Email
- Campus Visit
- Alumni Representative
- Purchased List
- PSAT List
- Sent Scores

To set up sales channels, set up the following:

- Lead score card
- OS: Default Channel for Lead Selection Engine profile option

- OS: Default Sales Channel profile option
- OS: Sales channel required profile option
- SALES_CHANNEL lookup

To set up lead management, see *Setting Up Lead Score Card and Setting Up Lead System Profiles, Oracle TeleSales Implementation Guide*.

See Appendix B, "Oracle Student System Profile Options" for information about profile options.

11.8.9 Set Up Timeframe

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

To set up the timeframe, set up the following:

- Lead score card
- OS: Default Decision Timeframe for Leads profile option
- DECISION_TIMEFRAME lookup

To set up lead management, see *Setting Up Lead Score Card and Setting Up Lead System Profiles, Oracle TeleSales Implementation Guide*.

11.8.10 Set Up Opportunity Management

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

- Details of the expressed interests
- Events
- Lead information concerning the prospect
- Values
- Probability of closure

- Recruiting team members involved with the opportunity
- Information on competitors
- Major obstacles
- Products or services that may be of interest

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

To set up opportunity management for recruiting, set up the following:

- Win probabilities
- Sales stages and sales methodology
- Interest types

11.8.10.1 Create Win Probabilities

Create win probabilities to determine the likelihood that a prospect will apply to your institution.

Win probabilities represent the current state of an opportunity. Institutions can link win probabilities to an opportunity to assist with forecasting applications and probable enrollment.

The following table describes sample win probabilities.

Table 11–4 Sample Win Probabilities

Win Probability	Meaning
0	Lost to Competitor
1	No Opportunity
5	Prospect
7	Applicant/Withdrawn
10	Denied Applicant
20	Admitted/Offer Declined
29	Committed/Withdrawn
30	Registered/Withdrawn
40	Applicant

Table 11–4 (Cont.) Sample Win Probabilities

Win Probability	Meaning
50	Admitted Applicant
80	Committed
90	Registered
100	Matriculated

To create win probabilities, see *Creating Win Probabilities, Oracle TeleSales Implementation Guide*.

11.8.10.2 Set Up Sales Stages and Sales Methodology

Set up sales stages and a sales methodology. The sales stages represent a methodology that corresponds to the probability range that a prospect will apply or enroll in your institution. The stages could represent a prospect’s inquiry status or the probability of enrollment.

The following table describes sample sales stages that you may want to leverage.

Table 11–5 Sample Sales Stages

Name	Description	Minimum Win Probability	Maximum Win Probability
Prospect	Prospect	0	5
Applicant/Withdrawn	Applicant/Withdrawn	0	7
Denied Applicant	Denied Applicant	0	10
Admit/Declines Offer	Admit/Declined Offer	0	10
Committed/Withdrawn	Committed/Withdrawn	0	29
Inquirer	Active Inquirer	30	39
Applicant	Applicant	40	49
Admitted/Applicant	Admitted Applicant	50	59
Committed	Committed	80	89
Registered	Registered	90	99
Matriculated	Matriculated	100	100

To define or modify sales stages, see *Defining or Modifying Sales Stages, Oracle TeleSales Implementation Guide*.

To set up sales methodology, see *Setting Up Sales Methodology, Oracle TeleSales Implementation Guide*.

11.8.10.3 Set Up Interest Types

Set up interest types to classify prospects, contacts, opportunities, and anticipated applicants for a targeted degree or education line of study.

Interest types can represent the areas of study that you provides for all learners. An interest type can represent any classification of an area of interest. Interest type classifications consist of three layers: Interest Type, Primary Interest Code, and Secondary Interest Code.

The following table describes sample interest type classifications.

Table 11–6 Sample Interest Types

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

To set up interest types, see *Setting Up Interest Types, Oracle TeleSales Implementation Guide*.

11.8.11 Set Up Notes and Note Types

Set up notes to capture customer information for any context that can be updated and viewed by any line of business across the entire organization at any time.

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

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

11.8.12 Set Up and Enable Interaction Tracking

To set up interaction tracking, see Setting Up Interaction Tracking, *Oracle TeleSales Implementation Guide*. To enable interaction tracking, see Enabling Interaction Tracking and Wrap-up, *Oracle TeleSales Implementation Guide*.

11.8.13 Set Up Task Types

Set up task types to classify tasks. Task types can be as specific as required. Sample task types might include the following:

- Update Open House Collateral
- Prep for High School Visit
- Send Housing Information

To set up tasks and task types, see Setting Up Tasks, *Oracle TeleSales Implementation Guide*.

11.8.14 Set Up Territories

To set up territories, see and Setting Up Territories, *Oracle TeleSales Implementation Guide*.

11.8.15 Set Up Custom Tabs

Set up custom tabs to provide the ability to display additional data or information associated with a prospect.

You can create two custom tabs within the eBusiness Center framework specification. These tabs are used to capture information from a variety of sources such as a student search or purchased list, additional bio-demographical data, or additional test score information.

To set up custom tabs, see Setting Up Custom Tabs, *Oracle TeleSales Implementation Guide*.

Program Structure and Planning

12.1 Program Structure and Planning Overview

Program Structure and Planning consists of:

- Programs
- Units
- Unit sections

The programs and units defined in this subsystem are used in the following subsystems:

- **Admissions:** Prospective students apply for admission to programs, or to single units, and are made offers of enrollment in programs
- **Enrollment:** Students are enrolled in programs, units, and unit sets
- **Advanced Standing:** Programs and units can be the basis for advanced standing applications, and advanced standing can be granted in units or at unit levels
- **Assessments:** Units have assessment items such as exams and assignments, and programs and units have grading schema
- **Government Statistics:** Unit and program details are included in files submitted to the government
- **Advanced Recruitment:** Oracle Marketing and Oracle Telesales
- **Student Finance:** Student fees can be managed when students apply for admission and enrol in programs
- **Financial Aid:** Student administration and financial management of higher education can be managed

Career Configuration

This section provides an overview of the Career functionality.

Purpose

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

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

For example, a student academic record consists of the student's undergraduate career. This career is linked to two program attempts: BA-History and BS-Engineering.

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

Career Overview

Academic reporting in institutions in the United States is primarily done by a student's career. You configure Oracle Student System for a career centric approach and set up the relationships among career, program and units.

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. 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

Terminology

The following describes career and program terminology.

Career-centric approach: Oracle Student System requires a single program to be designated as the key program for each student. Each career also has a primary program that identifies all units in the career. The key program can be used for fee calculation and attendance type calculation. In the career centric model, students can be in multiple programs, but these programs must belong to a career. A student can have multiple careers.

Program-centric approach: Oracle Student System uses all of the programs that student is enrolled in to perform functionality.

Program: User-defined classification of units. Students can have multiple programs and programs do not have relationship with each other.

Career: Grouping of programs within a program type. Multiple programs are grouped into a career, and the primary program defines a career.

Program type: User-defined organization of programs. Examples include graduate, undergraduate, and professional.

Primary career: Indicates the career that the institution defines as default.

Program attendance type: Based on all units for that program; one attendance type for each program.

Career attendance type: Based on units in the program designated as primary; one attendance type for career.

Institution attendance type: Based on all enrolled unit; total credit points divided by annual load for primary career or key program.

Program class standing: Calculation of a student's progress within a program. Examples include freshman, sophomore, and junior.

Career class standing: Calculation of a student's progress within a career or primary program. Examples include undergraduate, graduate, and professional.

Derivation

Career functionality affects the following:

Primary Program Type: When a new program attempt is created or an existing program attempt is modified in a way that potentially switches the primary program, the default primary program type values for each program attempt are determined by Oracle Student System.

An active program attempt is defined as Enrolled, Inactive, Lapsed, or Intermit. A program within the same career is defined as being of the same program type.

The following applies to the primary program type derivation:

- Primary program type should be Primary if no other active programs exist within the same career
- Primary program type of the lowest numeric rank should be Primary if all other active programs of higher numeric rank exist within the same career
- All other active programs within the same career with a higher numeric rank than the Primary primary program type should be Secondary
- Any active programs within the same carer that have a primary program source

Program Attempt Status: As elements of students' enrollment change over time, Oracle Student System automatically re-derives the program attempt status. The derivation must maintain the mapping between the primary and secondary statuses as described:

- **Unconfirmed:** No relationship exists until both programs have been confirmed, which must be done separately.
- **Inactive:** Also inactive
- **Enrolled:** Also enrolled
- **Discontinued:** Non-primary program becomes the primary program.
- **Intermitted:** Also intermitted. If the student wants to continue studies in non-primary programs, then the primary program must be discontinued.
- **Lapsed:** Also lapsed
- **Completed:** Non-primary program becomes primary. Because all unit attempts exist under the completed program attempt, any units that need to be moved to the new primary program must be moved through program transfer.

Note: Inactive Program Attempt means the students has a current program attempt but does not have any current enrolled unit. Enrolled Program Attempt means the students has a current program attempt and has current enrolled units.

- **Institution Attendance Type:** Attendance types are derived for each active program. Institution attendance types are derived as follows:
 - Credits points are summed for all units regardless of programs or career
 - Standard annual load of key program is determined
 - Credit points are divided by the standard annual load
 - Credit points divided by standard annual load is matched to the attendance type FTE range setup
 - Matched value is the student's overall institution attendance type

Program Transfer

Perform program transfers to transition a student from a program attempt to a new program. Oracle Student System creates a duplicate of academic credit within the new program attempt.

The following are program transfers that are allowed in Oracle Student System:

- Program transfer from a completed program attempt
- Enrolled unit attempt transfers are allowed
- Advanced standing transfers are allowed

Impact on Other Subsystems

Career functionality impacts the following:

- **Records and Progression:** All records totals and progression are measured according to the primary program within each career.
- **Financial Aid:** The requirements of financial aid are handled through academic statistics calculations in career. All credit points and GPA calculations are career centric.
- **Enrollment:** National student clearinghouse functionality requires you to report attendance type by student.
- **Student Finance:** The fee category and associated rates are determined for each primary program attempt and assessed independently. These charges are combined into a single student charge.

12.2 Program Structure and Planning Profile Options

Set up the following Program Structure and Planning profile options:

- **IGS: Call Number for Unit Section:** Select whether call number is used in Oracle Student System. If it is, then select whether the call number is system or manually generated. Call number can be used as a unique identifier for a unit section within a term.
- **IGS: Career Model Enabled:** Select the career or program model
- **IGS: Generate Curriculum:** Select whether curriculum ID is system or manually generated. The curriculum ID acts as the identifier
- **IGS: Country Code:** Enter your country code to enable country-specific functionality
- **IGS: Indicate whether ID Setting Scheduling Software is Installed:** Select whether third party scheduling is installed. This governs whether you can run the concurrent process for the scheduling interface.

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see *Oracle Applications User's Guide*.

12.3 Government Setup

Map user-defined codes and types to government codes and types for reporting purposes.

12.3.1 Setting Up Government Program Types IGSST001

Map each user-defined program type to a government program type. For example, Government program type 10 is mapped to Undergraduate Bachelor's Pass. You might select a local name, such as Shared Program, for the government program code 41 > Cross-institution undergraduate program. This could be given a unique code, such as Shared.

Navigation

Setups > Government Reference > Program Types

Additional Notes and Business Rules

Government program type: A government program type should be modified only to correct an error in the description. A government program type cannot be closed if any of the program types mapped to it are open. If a government program type is assigned to a user-defined program type, it cannot be deleted.

CAUTION:

- **Nonaward program code:** Government Program Type must be set to 50 if you want to enter a nonaward program code in the Applications window for an admission process category. Enter the Government Program Type of 50 in the Government Program Types window IGSS001 and map this Government Program Type of 50 with the Program Type in the Program Types window IGSPS001.
- **Association:** This Program Type is associated with the Program in the Basic Program Details window IGSPS013.

12.3.2 Setting Up Government Special Program Types IGSS002

A special program is a program of special interest to the government. Each program version is assigned a special program type.

A special program type is used to denote programs the enrollment statistics of which are of special interest to the government. A program defined in the Basic Program Details window must belong to a program type and a government special program type.

Navigation

Setups > Government Reference > Special Program Types > Government Special Program Types

Additional Notes and Business Rules

UK Note: The government special program types are used to derive the HESA special programs **SPPRG**, Field 52 of the student and combined returns. Therefore, the government special program types should be defined to be the HESA specified values for the **SPPRG** field.

Modification: After saving the special program type, only the description can be modified.

12.3.3 Setting Up Government Field of Study IGSST003

Map each user-defined field of study to a government field of study. More than one user-defined field of study can be mapped to the same government field of study.

For example, the government field of study 0101 > Animal Husbandry can be divided into 0101a > Animal Husbandry > Domestic Animals and 0101b > Animal Husbandry > Exotic Animals by the institution.

UK Note: The Government Field of Study Codes are used in the derivation of the subject of qualification aim **SBJQA1**, **SBJQA2** and **SBJQA3**, and the subject of undergraduate degree **PGCESBJ**, in the student and combined returns. Therefore, the government field of study codes should be set up as the Joint Academic Coding System (JACS) classification of academic subjects codes.

Navigation

Setups > Government Reference > Fields Of Study

Additional Notes and Business Rules

Modification: A government field of study should be modified only to correct an incorrectly entered description. A new government field of study is created.

Deletion: If a government field of study is assigned to an user-defined field of study, it cannot be deleted. To close a government field of study and prevent any further use, select the **Closed** check box. A government field of study cannot be closed if any fields of study mapped to it are open.

12.3.4 Setting Up Government Funding Sources IGSST006

Map each user-defined funding source entered in the Funding Sources window to a government funding source. A government funding source is not a required reporting element. Use government funding sources for your own purposes.

Navigation

Setups > Government Reference > Funding Sources

Additional Notes

Government funding source: A government funding source code should be modified only to correct an incorrectly entered description.

Deleting government funding sources: If a government funding source is assigned to a program or used elsewhere in the system, it cannot be deleted. To close a

government funding source and prevent any further use, select the Closed check box.

Closing government funding sources: A government funding source cannot be closed if any funding sources mapped to it are open.

UK Note: The government funding source is used when deriving the HESA major source of funding code **MSFUND**. The HESA major source of codes need to be set up as the government funding sources in Oracle Student System.

12.3.5 Mapping to Government Discipline Groups IGSST007

Map each user-defined discipline group to a government discipline group. Government discipline groups have unique codes to group units of study into like disciplines within branches of learning.

Navigation

Setups > Government Reference > Discipline Groups

Additional Notes and Business Rules

Mapping: More than one user-defined discipline group can be mapped to the same government discipline group.

Deleting government discipline groups: A government discipline group assigned to an user-defined discipline cannot be deleted.

12.3.6 Setting Up Government Program Attendance Types IGSST010

Map each user-defined government attendance type to a user-defined attendance type.

Navigation

Setups > Government Reference > Program Attendance Types > Government Program Attendance Types

Additional Notes

Closing government attendance types: Only government attendance types that are not mapped to an user-defined program attendance type and are not used can be closed.

Mapping: More than one attendance type may be mapped to a government attendance type.

12.3.7 Setting Up Government Program Attendance Modes IGSST011

Map each user-defined attendance mode to a government attendance mode.

You can create names for internal and external students, such as On Campus and Off Campus, with the codes On and Off. Map these codes to the government attendance modes Internal and External.

Navigation

Setups > Government Reference > Program Attendance Modes

Additional Notes

Mapping: More than one user-defined attendance mode can be mapped to the same government attendance mode.

12.4 HESA Reference Data

Program related data required for reporting to HESA and not captured in Oracle Student System is manually entered in the UK Statistics window. Data must be recorded for the program for a valid student or combined HESA return to be generated.

Define Oracle Student System HESA Field Codes

In Oracle Student System, there are additional fields that apply specifically to HESA reporting in the UK Statistics and HESA Detail windows. Each field is coded using an user-defined Oracle Student System code mapped to the appropriate HESA code by the extraction process.

The HESA Maintain Codes window maintains the Oracle Student System reference codes used in the UK Statistics, Program Offering, and Program Offering Options HESA Details windows.

The following table identifies each of the code sets for which code values must be defined.

Table 12–1 HESA Field Codes

Code	Description
OSS_CRDTSCM	OSS credit transfer scheme values
OSS_FEPRMK	OSS FE Program Marker
OSS_COSTCN	OSS cost centres
OSS_LOCSDY	OSS location of study
OSS_UFI_PLACE	OSS University For Industry
OSS_TYPEYR	OSS year type or program year
OSS_MODE_TYPE	OSS Mode of Study
OSS_FEEBAND	OSS fee band values
OSS_NHS_FUSRC	OSS NHS Funding Source
OSS_FRAN_ACT	OSS Franchising Activity

In addition the code set **OSS_FUNDLEV**, the OSS Funding Level which is used to capture the HESA Level applicable to Funding Council, **HESES** must be set up by all English and Northern Irish institutions.

All institutions that report teacher training programs to HESA must set up the codes for **OSS_TTCID**, the OSS Teacher Training Course Identifier which is used to capture the HESA Teacher training course identifier.

In addition, English institutions must also set up the **OSS_ITTPHSC** codes which are used to capture the ITT phase/scope.

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Wales:

Table 12–2 Teacher Training Program Codes Wales

Code	Description
OSS_ITTPHSC	OSS ITT phase/scope
OSS_BITTM	OSS bilingual ITT marker values

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Scotland:

Table 12–3 Teacher Training Program Codes Scotland

Code	Description
OSS_BITTM	OSS bilingual ITT marker values
OSS_TQSEC	OSS teaching qualification sought/gained sector
OSS_TQSUB123	OSS teaching qualification sought/gained subject values

The following table identifies each of the code sets for which code values must be defined for reporting teacher training programs for Northern Irish:

Table 12–4 Teacher Training Program Codes Northern Irish

Code	Description
OSS_BITTM	OSS bilingual ITT marker values
OSS_TQSEC	OSS teaching qualification sought/gained sector

See Chapter 27, "HESA" for information about using the Maintain Codes window.

12.5 Faculty Management

Faculty functionality enables you to monitor faculty workload, teaching assignments, teaching assignment conflicts, and non-teaching workload assignments.

Create and Assign Faculty Task Types

Create and assign faculty task types for major faculty tasks to a department's budget in the Faculty Task Type window. A task is any faculty workload other than teaching responsibility. You can assign a default workload amount to faculty task types in this window.

Create Codes for Multiple Academic Degrees

Create codes for multiple academic degrees in the Degree Codes window.

12.5.1 Setting Up Expected Workload IGSPS126

Expected workload applies to all faculty and staff members. Expected workload is setup for either a term calendar or an academic year. If you set up the expected

workload for a term calendar, you cannot set an expected workload for an academic year as well.

Each staff member has assigned workloads from teaching assignments and non-teaching assignments. The total assigned workload is compared against the expected workload. If you configure workflow, Oracle Student System warns you if the workload assigned for the staff member exceeds the expected workload.

Assigned workloads are calculated based on the calendar category of the expected workload setup. For example, if the expected workload is setup for an academic year, then Oracle Student System sums up all workloads within the academic year and used that to compared with the expected workload.

Note: If the teaching or non-teaching assignments span more than one term calendar or one academic calendar, Oracle Student System compares the assigned workload with the calendars that the tasks are associated with. For example, if a unit section is associated with both Spring and Fall, Oracle Student System sums up all assigned workload for Fall as well as for Spring. If the assigned workload exceed the expected workload in either of the calendar timeframe, Oracle Student System returns an error and does not allow you to save the assigning task.

Navigation

Program Structure and Planning > Faculty > Expected Workload > Expected Workload

Additional Notes and Business Rules

Calendar category: The **Calendar Category** field is the categorization of calendar types. Enter the calendar to which you want to assign faculty tasks.

Employment Category field:

- If Oracle Human Resource Management Systems is installed, the employment category is used to determine whether the faculty is a full time, part time, or regular staff.
- If Oracle Human Resource Management Systems is not installed, the employment category is derived from a lookup in Oracle Student System and populated only through the Person Import Process.

12.5.2 Setting Up Faculty Task Types IGSPS127

You can assign different types of tasks (other than academic) to the faculty apart from academic. For example, you can assign to a faculty member the task of a department chairman or a field trip supervisor.

Navigation

Program Structure and Planning > Faculty > Faculty Task Types > Faculty Task Types

Additional Notes and Business Rules

Closing faculty task types: You cannot delete a faculty task type. You must close the it if you do not want it to be used.

12.5.3 Setting Up Expected Workload Override Reason IGSPS128

Create reasons for overriding expected workload of a faculty.

Navigation

Program Structure and Planning > Faculty > Expected Workload Override Reasons > Expected Workload Override Reasons

12.5.4 Setting Up Degree Codes IGSPS093

Create degree detail codes for academic degree types, disciplines, and units, and enter them for faculty members.

Navigation

Program Structure and Planning > Faculty > Degree Codes > Degree Codes

12.5.5 Assign / Override Faculty Workload IGSPS129

Assign new tasks and workload to a faculty or override the assigned workload.

Prerequisites

Person details are set up.

Faculty task types are set up.

Override expected workload reasons are set up.

Navigation

Program Structure and Planning > Faculty > Assign / Override Faculty's Workload

Additional Notes and Business Rules

Person Number: You can select a person type of **Faculty** only.

Number of Rollover Period: Number of times task is to be rolled over. If you have two terms, Spring and Fall, and you want to roll over a task from Spring 2004 to Spring 2005, the rollover period number is **2**.

12.6 Program

Program setup includes setting up your program data and mapping this data to government codes. Awards for achievement are also set up in Program. You can create many user-defined elements necessary for use in Oracle Student System. You must set up these elements before they can use them in other subsystems of Student System.

The program elements defined and maintained by the Program windows include the following:

- Stages of development
- Versions
- Attributes
- Offerings
- Rules
- History

You also use program and unit details in other subsystems and through special inquiry or reporting interfaces. For example, program and unit details are used extensively in the Admissions, Enrollment, and Assessment subsystems.

Relationships Between Main Data Groups

Reference data defines programs and units. For example, a program status is required to define a program. The permissible set of program statuses is maintained separately, as reference data. Reference data remains relatively static over time.

Individual program and unit details, however, are defined by their combinations of attributes, including those defined as reference data.

Relationships Required to Define Program Versions

To define a program version, a program type, program status, government special program type, and organizational unit must be defined. Similarly, to define a program status, a system program status must be assigned to it. A program type must be assigned a government program type but a program type group is optional.

Relationships Between Program Details

Many of the attributes of a program version are defined by other data maintained as reference data. For example, a program version can be assigned a program field of study. The field of study must be maintained as reference data and depends on the existence of an appropriate government field of study.

Relationships Between Program Versions and Offerings

Some of the elements must be provided in order to change the status of the program from Planned to Active. These elements are: Program Awards, Program Field of Study, and Program Ownership.

Students enroll in a particular program offering pattern of a program. A unique program offering pattern is created by combining information related to a specific program version with information describing when, as indicated by calendar, where, as indicated by location, and how, as indicated by attendance type and mode, the program is offered.

Notes

Note functionality enables additional information to be attached to certain data. The note type attribute enables notes to be grouped according to a common characteristic. Notes of many types can be created, each type reflecting the purpose of notes associated with it.

Notes can be created, stored, and retrieved in text format.

The level in a subsystem where different notes are attached depends on your business practices. Within the Program Structure and Planning subsystem, notes can be attached to data at the following levels:

- Program version
- Program offering
- Program offering option
- Program offering pattern

- Unit version
- Unit offering
- Unit offering option
- Unit offering pattern
- Catalog version
- Schedule version
- Unit section note

Program and Unit Rollover

To reduce the work involved in maintaining curriculum and associated data, Oracle Student System provides rollover functionality by which existing program and unit information can be used to create the following new information:

- New programs and program versions based on existing program versions
- New units and unit versions based on existing unit versions
- New unit offering patterns, unit offering pattern waitlists, and unit sections based on existing unit offering patterns, unit offering pattern waitlists, and unit sections
- Program offering instances and patterns in a new academic period based on program offering instances and patterns of a former academic period. If required, a particular organizational unit can also be rolled over.
- Program offering instances and patterns in a new teaching period based on unit offering options and patterns of a former teaching period. If required, rollover can be accomplished by running several concurrent processes. A particular organizational unit can also be rolled over.

12.6.1 Setting Up Program Type Groups IGSPS002

Create program type groups to provide a grouping of program types that meet the specific needs of your institution.

Prerequisites

Program types are set up.

Navigation

Program Structure and Planning > Program > Program Type Groups

Additional Notes and Business Rules

Changes:

- If a program type group is used in the definition of a program type, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.
- It is preferable to create a new program type group if the changes in the description are substantial.

12.6.2 Setting Up Enrollment Categories IGSEN009

Enter user-defined set of enrollment categories. Enrollment categories classify different methods and procedures involved in enrolling students. Enrollment categories configure enrollment sessions and the layout and content of the Student Enrollments and Special Requirements windows.

An enrollment category **Interntl** can be created specifically to accommodate the enrollment of international students.

Entering **Interntl** as the enrollment category parameter in the Session Details window causes the content and layout of the subsequent Student Enrollments window to be configured according to the procedures specified for **Interntl** in the Enrollment Category Procedure Details window.

Note: It is recommended that enrollment categories setup is completed during setup of each program. The information necessary to complete this setup should be gathered in advance of this procedure.

Navigation

Enrollments > Setup > Categories

Additional Notes and Business Rules

Deletion: You cannot delete an enrollment category.

12.6.3 Setting Up Program Types IGSPS001

Program types permit you to enter detailed classification levels and use program type names. You can create groups of these program types to group programs into an appropriate classification.

A program type can be assigned to membership in a program type group for future inquiry, reporting, and manipulation of programs by group.

Prerequisites

Government program types are set up.

Navigation

Program Structure and Planning > Program > Program Types > Program Types

Additional Notes and Business Rules

Financial Aid Program Type field: This field defaults to **Bachelors**. You must change this to match the correct program type. This field is required if the profile option for Financial Aid is set to **Yes**.

Deletion: You cannot delete a program type. You must close the it if you do not want it to be used.

Program Type field: A program type used in the definition of a program cannot be deleted and only the description can be modified. Modification is not recommended unless the change in description is minor and does not affect the meaning of the program type. At least one user-defined program type must be created to correspond to each government program type.

Mapping: More than one user-defined program type can be mapped to the same government program type.

Enrollment Category field: The enrollment category applies to students who did not come from the admission process.

Award Program check box: Selected by default. If deselected, then the program type applies to nonaward programs.

Research Type check box: If selected, then the program is one for which candidacy details are collected as part of admission and enrollment processes.

12.6.4 Setting Up Program Categories IGSPS003

A diverse set of programs, with attributes that cannot be easily selected, can be categorized for inquiry, reporting, and manipulation of programs by category.

For example, all programs of the institution that include the study of Chinese language can be grouped for the purpose of managing students' academic progression in an user-defined program category CL > Chinese Language.

Previously created categories can be assigned to a program version for the purpose of grouping program versions. Program categories can be used for specific purposes within the Statistics subsystem.

Fields in the Program Categorizations region of the Program Categorizations window are protected from modification. To modify program categorizations, add and delete program categories.

Navigation

Program Structure and Planning > Program > Program Categories > Program Categories

Additional Notes

Deletion: If a program category is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the **Closed** check box. If a program category is used in the definition of a program, only the description can be modified. It is preferable to create a new program category if the changes in the description are substantial.

12.6.5 Setting Up Fields of Study IGSPS004

User-defined fields of study permit classification at a more detailed level to meet your needs.

Prerequisites

Government fields of study are set up.

Navigation

Program Structure and Planning > Program > Fields of Study

Additional Notes and Business Rules

UK Note: The government field of study codes should be defined as the HESA subject codes.

Deletion: You cannot delete a field of study. You must close it if you do not want it to be used.

12.6.6 Setting Up Program Attendance Modes IGSPS005

Create program attendance modes to indicate how the program is delivered. Examples include On Campus and Off Campus.

Prerequisites

Government program attendance modes are set up.

Navigation

Program Structure and Planning > Program > Program Attendance Modes

Additional Notes and Business Rules

Deletion: If a program attendance mode is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

12.6.7 Setting Up Program Attendance Type IGSPS006

Create program attendance types to indicate the amount of time a student is attending a particular program. Example attendance types are full-time and part-time.

Attendance types are used in the definition of program offering options and for institution administrative purposes such as calculation of fees and charges.

In the Attendance Type region of the Program Attendance Types window, the acceptable per annum Full Time Equivalency (FTE) range necessary to meet the definition of each attendance type is entered. This is used to calculate the attendance type and load of students for government statistical returns and for some fees. It is the total of a student's current program attempts across all enrolled teaching periods that is calculated against the load ranges entered. For multiperiod enrollments, the calculation uses the relevant apportionment factor.

A research percentage is also entered against an attendance type. This percentage is used as the default attendance percentage value for a research candidacy in a program with that attendance type.

In the Attendance Type Load region of the Program Attendance Types window, the load ranges required to meet the definition of each attendance type within the period of specific load calendars are entered. These load ranges are used to calculate the attendance type of students for institution purposes, such as calculation of service fees and to ensure that a student's enrollment conforms to the program attendance type where a student is forced or required to undertake a program with a particular attendance type. A student's program attempt attendance type is validated against the load ranges entered. A default FTE value is entered for each attendance type within the specified load calendar period. This default FTE value must exist for calculation of some fees using the predictive fee assessment process.

For example, institutions can further subdivide the government attendance types 1 > full-time and 2 > part-time to facilitate local operations. You can also use locally recognized codes to describe full-time or part-time load, such as FT and PT. In either case, each user-defined attendance type must map to a corresponding government attendance type.

The load range for a year in FTE, which defines each attendance type, is entered as the academic period load range. For government reporting purposes, a student's unit load is calculated across all program attempts, and the student is deemed to be of a particular program attendance type if the student's load falls within the load range of the attendance type.

Program attendance types cannot be deleted.

Attendance Type Load

Because a student's attendance type can be assessed in periods less than a full year for enrollment, validation, service fees, and travel concessions, it is necessary to be able to define the standard load range that constitutes each attendance type in each of the shorter periods. The student's calculated unit load can then be compared to the load ranges defined for an attendance type for the periods defined by specific load calendars.

For example, full-time study at an institution can equate to a load of 0.75 FTE or more in a year. The institution can determine its students' attendance types for each semester. The institution can determine that a load between 0.375 and 9.999 FTE constitutes a full-time load in each of semester 1 and semester 2. Therefore, a student can be classified as full-time for the year with a load of 0.75 FTE, but

part-time for semester 1 and full-time for semester 2 with loads for each of these periods of 0.25 and 0.5 FTE, respectively.

Prerequisites

Government program attendance types are set up.

Calendar types are set up.

Navigation

Program Structure and Planning > Program > Program Attendance Types > Program Attendance Types

Additional Notes and Business Rules

Deletion: If a program attendance type is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

Lower Load Limit field: Enter the lower load limit representing the acceptable per annum FTE range necessary to meet the definition of the selected attendance type.

Upper Load Limit field: Enter the upper load limit representing the acceptable per annum FTE range necessary to meet the definition of the selected attendance type.

Research% field: Represents the default attendance percentage for a research student in a program of the selected attendance type.

Lower Enroll Load Range field: Enter the FTE range that defines the attendance type for the selected load calendar.

Upper Enroll Load Range field: Enter the FTE range that defines the attendance type for the selected load calendar.

Default Equivalent Full Time Student Unit field: Enter the default FTE applicable to the selected attendance type.

Ranges:

- The load limit ranges for two open attendance types cannot overlap.
- There must be no gaps in the academic period load ranges, which means that the full possible load range must be covered by the attendance types.
- The enroll load ranges for two open attendance types specified for a specific load calendar cannot overlap.

- There must be no gaps in the enroll load ranges for a specific load calendar, which means that the full possible load range must be covered by the attendance types.
- After being used, load range data must not be deleted or modified. A major change in teaching calendar or load calendar structure requires the creation of new calendars and new load apportionment.

Changes: Changes within the Program Attendance Types window affect the calculation of a student's derived program attendance type.

Default FTE: A default FTE value must exist for the processing of predictive fee assessment for the selected attendance type.

12.6.8 Setting Up Program Group Types IGSPS007

Programs can be gathered into ad hoc groups for specific purposes. Each program group is identified by a unique code. Program group types classify program groups according to the purpose of the grouping. Each program group must be mapped to a program group type. Every program group type must be mapped to a system program group type that is recognized by the system for other functionality.

Navigation

Program Structure and Planning > Program > Program Group Types

Additional Notes

Closed program group types:

- A program group type cannot be added against a closed system program group type.
- A program group type cannot be reopened if it is mapped to a Closed system program group type.
- If a program group type is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.
- If a program group type is used in the definition of a program, only the description can be modified. It is preferable to create a new program group type if the changes in the description are substantial.

12.6.9 Setting Up Awards IGSPS008

Students receive awards for satisfying the completion requirements of their programs. The maintenance of a record of all awards, which are approved through a due process, demands that an award must not be deleted once it is properly created.

In Program-Centric Mode, the award mark is the basis for the honors level determination. The unit level weighting is attached to the award.

Award Types

The system award type indicates to the system if the award is a program award, honorary award, entry qualification, or special award such as a medal or prize. Awards can be assigned to program versions using the system award type Program in the Program Awards window and are ultimately applied to diplomas, academic transcripts, and graduation processes.

Creating an award with the system award type Honorary permits its assignment to new graduand records in the Graduand Details window and its ultimate application to diplomas and other graduation processes.

Students receive awards representing a medal or prize. Creating an award mapped to either the system award type Medal or Prize permits its use in student program attempt special award records in the Special Awards window.

For example, Bachelor of Commerce, Bachelor of Arts in Education with Honors, and Master of Education are examples of awards assigned to program versions. The award code for each award can be alpha, numeric, or both alpha and numeric.

Awards and Program Versions

The link between an award and a program version is maintained using the Program Awards window.

For example, if Bachelor of Commerce is selected in the Award region of the Awards window, all programs associated with Bachelor of Commerce are displayed. Students successfully completing one of these programs are awarded a Bachelor of Commerce degree.

If an student entry qualifications are going to be captured in the Qualifications Details window, entry qualifications should be created as awards with an associated grading schema. An entry qualification, which is also going to be used as an exit award should have a system award type of Program. For example, a student could be awarded a Bachelors of Science (BS), and an applicant for a postgraduate program could have a BS, so BS should be set up as an award with type **Program**. Other entry qualifications can have a system award type of **Entry Qualification**.

Prerequisites

Locations are set up.

Credential types are set up.

Navigation

Program Structure and Planning > Program > Awards

Additional Notes and Business Rules

Deletion: Awards cannot be deleted. You must close an award if you do not want it to be used.

Weighted Average Mark Weighting: If there is a **Weighted Average Mark Weighting** value entered at the Unit Level, then that value defaults into the **Weighted Average Mark Weighting** field but can be overridden.

Award Mark: Only those levels that will comprise the award mark must be entered. Certain awards may only consider certain levels.

Career-centric mode:

- **Grading Schema:** Enter the grading schema that is used to derive the award grade (honors level).
- **Unit Level:** Enter the unit levels that are to be considered when calculating the award mark.

Program-centric mode:

- **Grading Schema:** When the system award type is **Program**, this is the grading scheme that is used to derive the award grade (honors level). When the system award type is **Entry Qualification**, this describes the award grading schema.
- **Statistic Type:** The statistic that provides the GPA that is used to determine the award grade (honors level). This field is required only if a grading schema is entered.

Grading Schemas: The validation of the grading schema fields is based on system award type and includes selection of grading schema types Award: Secondary and Tertiary Awards if the system award type is **Entry Qualification** and Honors: Honors Level Grading Schema when the system award type is **Program**.

Honors Levels Basis block:

- The Honors Levels Basis block on appears when the system award type is **Program**.

- The Honors Levels Basis block is also dependent on IGS: Career Model Enabled:
- If Career Model Enabled is No, then the program-centric block is displayed
- If Career Model Enabled is Yes, then the career-centric block is displayed

Calculation: A program award does not require an honors level calculation. If the grading schema is left blank, no honors level will be calculated. If a grading schema exists, entry into the Honors Levels Basis block is required.

12.6.10 Setting Up Program Statuses IGSPS009

Program status classifies the state of activity of program versions, such as whether program versions are active or inactive. This status can impact enrollment.

The following table describes program statuses.

Table 12–5 Program Statuses

Program Status	Description
Active	Students can enroll in program Can be changed only to Inactive Only one version of active program and unset expiration date can exist; before changing status of new program version to Active, status of existing program version must be changed to Inactive or expiration date must be entered
Inactive	Students cannot enroll in program Can be changed only to Active System does not check for closed reference data when changing Inactive to Active Program status can be changed to Inactive only when end date is entered Details of inactive program version cannot be modified
Pending	Program needs to be approved and have its status changed to Planned or Active before students can enroll

Table 12–5 (Cont.) Program Statuses

Program Status	Description
Planned	Students can enroll in program in future New programs must be Planned Can be changed only to Active or Inactive When status is changed from Planned to Active, system checks related program offerings and displays message if closed or missing reference data is found; correct data must be entered before status becomes Active, or new version must be created The elements are: Program Awards, Program Ownerships and Program Field of Study.

Navigation

Program Structure and Planning > Program > Program Statuses

Additional Notes and Business Rules

Deletion: If a program award is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

12.6.11 Setting Up Funding Sources IGSPS010

A funding source is a means of classifying programs according to the primary source or sources of funding for a program. Funding sources can be assigned to program versions using the Restricted Funding Sources window to identify the funding source of each student program enrollment.

You are required by the government to report statistics about programs they offer and enrollments in these programs, including government funding sources.

Prerequisites

Government Funding Sources are set up.

Navigation

Program Structure and Planning > Program > Funding Sources > Funding Sources

Additional Notes and Business Rules

Deletion: If a funding source is used in the definition of a program, it cannot be deleted. It can be closed to prevent further use by selecting the Closed check box.

Mapping: A funding source cannot be mapped to a Closed Government funding source.

UK Note: Government funding source should be defined as the HESA major source of funding codes **MSFUND**.

12.6.12 Setting Up Reference Code Types IGSPS011

In Oracle Student System, reference information can be created and maintained by performing the following tasks:

- Defining reference code types and associated reference codes
- Defining the applicable levels for these reference code types and reference codes
- Associating specific reference code types and reference codes with specific programs, program offering options, units, unit sections, and unit section occurrences.

Reference code types classify reference codes into families or clusters of codes. user-defined reference code types must be assigned to system reference code types.

Program reference codes can also be entered to identify a program version for other specific purposes. Each program version in Oracle Student System is identified by its unique combination of program code and version number. This feature is particularly useful for entering codes used by other systems to identify a program version.

Each reference code assigned to a program version must be assigned a reference code type, which is maintained in the Reference Code Types window. Reference code types are mapped to system reference code types that are recognized by the system for specific functions. The mandatory reference types cannot be deleted or modified. Reference codes can be modified for the mandatory reference types.

Reference Codes for Program of Study

DETYA statistical reporting, elements 393 and 394, requires that programs leading to an undergraduate award that are essentially the same but that have different program codes, be identified by a program of study code. In Student System, this is achieved by attaching a single program of study code to each of the like program versions using the program reference code mechanism.

For example, the programs M300, M300A, M300B, and M300C are essentially the same program offered to different cohorts of students. They must be reported to DETYA under a single program of study code, such as M300. The instructions in

this procedure show the advantages of using an existing program code as the program of study code.

Reference Codes for Program Entry Point

Each program offering option is uniquely identified by a program code, version number, calendar type, location code, attendance mode, and attendance type. The Program Entry Point Reference Codes window to enter and maintain the codes used by other systems or organizations to identify a program offering option, such as VTAC.

Program entry point reference codes are defined by specifying the reference code type of the entry point reference code and a unique reference code. Note that reference code types map to system reference code types. Unit set can also be attached to entry points. Whenever a new program offering option is created, the mandatory reference types and the default reference code are created. These mandatory reference types cannot be deleted or updated. The reference codes can be modified if Required.

Navigation

Program Structure and Planning > Program > Reference Code Types

Additional Notes and Business Rules

Mapping: Reference code types cannot be mapped to a closed system reference types.

UK Note: The following program reference codes should be defined:

- Reference code type: **REGBODY**
- Description: **Regulatory body**

This is used to derive the Regulatory body for health and social care students. the user defined codes will be mapped to the HESA specified codes when the HESA return is generated.

Adding: If the reference code type is marked with restricted reference code values, then the reference code for the reference code type is required during the setup of reference code type. If it is not restricted, then you can add reference codes for the reference code type at the specific level:

- program
- unit

- unit section
- unit section occurrence

Changes: If changes in the description are substantial, a new reference code type should be created.

Self-service: Select **Used in Self-Service** check box if the reference code type is to display in self-service windows.

Multiple Use: An unlimited number of reference codes may be entered for each reference code type. If multiple reference codes are entered, one must be selected as the default by checking the Default check box. Enter as associated description for each reference code.

12.6.13 Setting Up Program Stage Type IGSPS028

Program stage types are codes that indicate the level of progression in a student program attempt.

The data maintained in the Program Stage Types window identifies the stages of individual programs in the Program Version Notes window.

Navigation

Program Structure and Planning > Program > Program Stage Types

12.6.14 Setting Up Disciplines IGSPS040

Discipline groups are uniquely coded to classify units of study into similar disciplines within academic learning.

Discipline group codes can be alpha, numeric, or a combination of both.

Prerequisites

Government discipline groups are set up.

Navigation

Program Structure and Planning > Unit > Disciplines > Disciplines

12.6.15 Setting Up Program and Unit Note Types IGSPS069

Notes of many types can be created, each type reflecting the common purpose of the notes associated with it. Notes can be created, stored, and retrieved in almost any format.

A note type is an user-defined classification of notes related to a program. For example, a Handbook note type can refer to notes containing information for publication in an institution's official handbook.

The text notes procedure attaches additional information to records in Student System and can be accessed from windows in many subsystems.

All notes must be assigned a note type. The types are defined by the institution for each subsystem in which notes are used.

Navigation

Program Structure and Planning > Program and Unit Note Types

12.6.16 Setting Up Dictionary of Occupational Titles IGSPS070

The *Dictionary of Occupational Titles* codifies all professions and professional titles.

The Occupational Titles and Related Programs window is used to view programs at your institution that are available for students interested in the associated occupations.

Navigation

Program Structure and Planning > Program > Occupational Titles Dictionary > Occupational Titles Dictionary

Additional Notes and Business Rules

Dot Code field: Data in the DOT Code field cannot be modified.

Deletion: If a Dictionary of Occupational Titles record is associated with a program, it cannot be deleted.

12.6.17 Setting Up Catalog Definition IGSPS096

Create and maintain catalog definitions.

Navigation

Program Structure and Planning > Catalogs and Schedules > Catalog Definition

Additional Notes and Business Rules

Versions: Versions cannot be deleted if referenced in the Note Details region of the Catalog Notes and Schedule Notes windows.

Note types: Note types cannot be deleted if referenced in the Note Details region.

12.6.18 Setting Up Catalog Notes IGSPS097

Create catalog notes and map them to a note type.

Prerequisites

Catalog definitions are set up.

Navigation

Program Structure and Planning > Catalogs and Schedules > Catalog Notes > Catalog Notes

12.6.19 Setting Up Schedule Definition IGSPS096

Create and maintain schedule definitions.

Navigation

Program Structure and Planning > Catalogs and Schedules > Schedule Definition

Additional Notes and Business Rules

Versions: Versions cannot be deleted if referenced in the Note Details region of the Catalog Notes and Schedule Notes windows.

Note types: Note types cannot be deleted if referenced in the Note Details region.

12.6.20 Setting Up Schedule Notes IGSPS097I

Create schedule notes and map them to a note type.

Prerequisites

Catalog definitions are set up.

Navigation

Program Structure and Planning > Catalogs and Schedules > Schedule Notes > Schedule Notes

12.6.21 Setting Up Basic Program Details IGSPS013

Create programs. A program includes one or more areas of study that can lead to a formal award. Each program is defined by numerous attributes. Students are enrolled in particular program versions.

Many versions of a program can be created if new versions have significantly different attributes from previous versions. Program versions represent a history of changes made to a program's attributes. Students can complete the program version they are enrolled in even if a different program version is offered to new students. The institution determines whether changing one or more attributes results in the creation of a new version.

Oracle Student System provides the following rules for program versions:

- Articulated Programs
- Program Version Completion
- Program Version Honors Level
- Core

Navigation

Program Structure and Planning > Basic Program Details

Additional Notes and Business Rules

Program Status: You cannot delete records if program status is Active or Inactive. You cannot change program status from Active or Inactive to Planned. You can change a program status of Planned to Active or Inactive.

Program Type: The program type must be Award if program awards exist for the program. That is, if program completion results in awarding a degree or certificate, it must be of type **Award**.

Supplemental Exam check box: This check box in the Basic Unit Details window overrides the **Supplemental Exams Permitted** check box in this window.

Generic Program: If selected, then the program is generic. In the transfer process, a program to be transferred must have the **Generic** check box selected.

Graduate Students: If selected, then students can graduate from program or the program is an award program.

Effective Date: The end date field must be left blank when creating new program version. An end date is entered only for inactive program versions. A program's end date must be greater than or equal to the expiration date if an expiration date is set.

Expiration Date: Units with an expiration date cannot be used by the Admissions subsystem except for readmission.

Allow Intermission: If selected, then students can take intermission from program version.

Count In Progression: If selected, then intermission period is counted in progression.

Qualification Recency: Time period, in years, for which other studies will be recognized for the purpose of granting advanced standing in a program.

External Limit: Maximum amount of advanced standing that can be granted in the program for studies undertaken outside the institution.

Internal Limit: Maximum amount of advanced standing that can be granted in a program for studies undertaken at the institution.

Min Submission%: Percentage of total effective full-time days that must pass before a research thesis can be submitted. This value is used in the calculation of submission dates for research candidature.

Residency Credit Points Req'd: Minimum number of credit points student must take at institution, rather than abroad or at another institution.

Credits Total Effective Full Time Student Units: Total full-time equivalency for the program; represents the student load for a unit or part of a unit expressed as a proportion of the workload for a standard annual program for students undertaking a full year of study in a particular year of a particular program.

Standard Annual Load: Load in credit points that a full-time student would normally study in a year if enrolled in the program. This is used to calculate the relative weighting of the units for the Effective Full Time Student Units calculation. If the program annual load for a program version is not constant for each year of the program, the Standard Annual Load field must be left blank and the Program Annual Load window must be used to enter the annual load for each year of the program.

Contact Hours: Minimum number of contact hours, which is in-class time for a unit, Required of the student for completion of the program.

Government Program Load: Aggregate Effective Full Time Student Units value for a program, expressed in tenths.

Min Credit Points Per Calendar: Minimum number of credit points student must have in teaching period. The value must be less than or equal to the maximum credit points value. If null, there will be no maximum rule applied through self-service enrollment functionality. If the minimum and maximum credit points per calendar fields are null, the enrollment process will not have a minimum and maximum credit point to validation during enrollment. Therefore, the student can enroll in unlimited number of credit points in the calendar.

Max Credit Points Per Calendar: Maximum number of credit points student can have in teaching period. This data is used to validate student schedules during enrollment to prevent students from overloading their schedules.

Maximum Waitlist per Student: Maximum number of waitlists allowed per student by term; enabled if Waitlist Allowed check box is selected in the Institution Waitlist Option window. Valid values include a numeric value, null, and 0. If field is null, then Oracle Student System checks institution setup to determine the maximum number of waitlist allowed for student.

12.6.22 Setting Up Program Version Notes IGSPS027

Enter additional information for a program version.

Navigation

Program Structure and Planning > Basic Program Details

12.6.23 Setting Up Special Requirements IGSPS062

Enter user-defined special requirements that count toward program completion. User-defined special requirements codes indicate the units completed by individual students earlier in fulfillment of their program attempts.

Data created in this window is used in the Special Requirements window.

Navigation

Program Structure and Planning > Program > Special Requirements

Additional Notes and Business Rules

Special Requirement Code: This field is a unique identifier of special requirement to be fulfilled by the student for program completion.

12.7 Program Details

Program details are user-defined data about programs. Set up your programs for use throughout Oracle Student System.

12.7.1 Setting Up Program Groups IGSPS012

Each program group is assigned a program group code and a group type that identifies the purpose of the program group and enables additional functionality. The organizational unit responsible for the program group is also recorded.

Prerequisites

Calendar types are set up.

Government program attendance types are set up.

Navigation

Program Structure and Planning > Program > Program Groups > Program Groups

Additional Notes and Business Rules

Program Group: If a program group has members, it cannot be deleted. If a program group has members, only the description can be modified if the change does not affect the meaning of the program group.

Functions, reports and queries: Programs added to a program group are included in the program group's functions, reports, and queries. Programs deleted from a program group are not included in the program group's reports or queries.

Adding program groups: A program group cannot be added to a closed group type. A program group cannot be added to a closed organizational unit.

12.7.2 Setting Up Program Awards IGSPS017

Create awards that result from successful completion of a program, such as Bachelor of Science or Diploma of Business Administration. The award codes, their corresponding titles, and diploma types are maintained in the Awards window.

Also, define award ownership. An award can be owned by more than one organizational unit in varying proportions.

Prerequisites

Awards are set up.

Organizational structure is set up.

Navigation

Program Structure and Planning > Basic Program Details window > Other Program Details > Program Award > Program Awards

Additional Notes and Business Rules

Award code: Programs with multiple awards must have multiple fields of study and vice versa. The Award Code field in the Program Awards window is protected against modification. An incorrectly entered program code can be deleted and the correct code inserted.

Default check box: If selected, then an award is selected as default for a program.

Program award ownership percentage: If the award is owned entirely by the selected organizational unit, enter 100 in the % field. If the award is owned by more than one organizational unit, enter the proportion of ownership of this organizational unit up to two decimal places in the % field. For example, enter one third ownership as 33.33. After an owning organizational unit is deleted, if any owning organizational units still remain, the percentages for the remaining organizational units must be adjusted until the total is 100. Any alteration to ownership percentages must still total 100.

Combined degrees: Combined degrees are an example of programs that can have more than one award.

Deletion: Program awards cannot be deleted. You must close program awards if you do not want that program award to be used.

UK Institutions:

- The program awards are used to derive the HESA general qualification aim, **QUALIAM** and the HESA FE qualification aim, **FEQAIM**, fields 41 and 42 of the combined and student returns.
- The user-defined awards are mapped to the HESA qualification and FE qualification aim codes. For more information, see Chapter 27, "HESA".

- If one award is flagged as the default, or there is only one program award, the HESA code mapped to this award is returned. If multiple awards are flagged as default, or there are multiple program awards and none are flagged as default, the award which is mapped to the lowest HESA code is returned.
- The award ownership is used to derive the awarding body 1 and 2 HESA fields, fields 47 and 48 of the combined and student returns. If the award is made by an institution other than the institution submitting the return, the awarding institution needs to be defined as an institution with at least one organizational unit which can be associated with the award.

12.7.3 Setting Up Program Fields of Study IGSPS018

Create user-defined program fields of study and map them to government fields of study used for statistical reporting. Changes to fields of study can affect these statistics.

One or more fields of study can be entered for a program version. Each field of study can be assigned a percentage representing the proportional weighting of the field of study in relation to other fields of study of the program version. The total of the percentages for all fields of study for a program version must be 100.

For example, the program Bachelor of Arts, Languages can have the field of study Linguistics entered for it. This can be mapped to the Government Field of Study 030304 - Linguistics.

Prerequisites

Fields of study are set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Field of Study > Program Fields of Study

Additional Notes and Business Rules

Program version: A program version can have more than one field of study. Closed fields of study cannot be added to program versions.

Combined degree programs: Combined degree programs are the only programs that have more than one field of study.

Major field of study: Only one field of study can be identified as the major field of study.

Active and Inactive fields of study: A field of study cannot be altered once the program version is made Inactive. An Active program version must contain at least one field of study. If all fields of study are deleted, at least one new field of study must be added before the program version is saved.

Changes: Only the Major field and Percentage fields can be modified. To change a field of study, it is necessary to delete incorrect records or create new records.

Options: If only one field of study is defined for the program version, the Major Field check box is selected by default. Enter 100 in the % field. If more than one field of study is created, select the Major Field check box for the field of study considered to be the major field of study and adjust the percentage values in the % field of all records so that their total is 100.

UK Note: For UK institutions, the program fields of study and associated percentages are used to derive the HESA subjects of qualification aim, **SBJQA1**, **SBJQA2** and **SBJQA3**, fields 46-48 of the student and combined returns and the proportion indicator, **SBJBID**, field 49. If a program has 2 fields of study which both have percentage assignment of 50 then the proportion indicator is derived as balanced combination. If the program has 2 fields of study which are not allocated 50/50, then the proportion indicator is derived to be a Major/minor combination.

12.7.4 Setting Up Program Ownership IGSPS014

In general, the owner or owners of a program version are responsible for the delivery of the program to students. A program version can be owned by more than one organizational unit in varying proportions.

Prerequisites

Organizational structure is set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Ownership > Program Ownership

Additional Notes and Business Rules

Percentages: Ownership of a program must total 100%. If, after an owning organizational unit is deleted, any owning organizational units still remain, the percentages for the remaining organizational units must be adjusted until the total is 100.

Ownership: Program ownership can be added only against organizational units that are Active. Program ownership cannot be altered once the program version is made Inactive.

Reports and Statistics: Assigning ownership of a program version to one or more organizational units permits use of this information elsewhere in the system. In particular, the information can be used in reports and statistics.

Changes: Program ownership can be changed at any time after setup as long as percentages total 100. To change an owning organizational unit, the existing owning organizational unit must be deleted and a new owning organizational unit added.

12.7.5 Setting Up Program Group Membership IGSPS015

A program version is assigned to a predefined program groups. Any functionality specified as applying to the program group is applied to the program version by virtue of its membership in the group. Reports can be generated by program group which results in the selection of all group members.

Fields in the Program Group Memberships region of the Program Group Membership window are protected from modification. Modification of group memberships can be achieved only by adding new program groups and deleting old program groups.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Group Membership > Program Group Membership

Additional Notes and Business Rules

Program group: The program group to which the program version is assigned must exist in the system. Program groups are created and maintained using the Program Group Membership window. The same window also assigns program versions to program groups when a number of program versions are to be assigned to one program group.

Program version: A program version cannot be added against a Closed program group.

Program group membership: Program group membership cannot be altered once the program version is made Inactive. Assigning a program version to membership of a program group causes any functionality applied to the program group to affect the program version.

Deletion: Program groups cannot be deleted. You must close program groups if you do not want that program group to be used.

12.7.6 Setting Up Program Reference Codes IGSPS023

Program reference codes can be entered to identify a program version for other specific purposes. Each program version in Oracle Student System is identified by its unique combination of program code and version number. This feature is particularly useful for entering codes used by other systems to identify a program version.

Each reference code assigned to a program version must be assigned a reference code type, which is maintained in the Reference Code Types window. Reference code types are mapped to system reference code types that are recognized by the system for specific functions.

Prerequisites

Reference code types are set up.

Navigation

Program Structure and Planning > Program > Reference Code Types > Other Program Detail > Program Reference Code > Program Reference Code

Additional Notes and Business Rules

UK Institutions: To derive the regulatory body for health and social care students, **REGBODY**, field 170 of the combined return, field 155 of the student return, a program reference code with type **REGBODY** should be set up for the program. This is only required for programs with HESA general qualification aim of:

- **15:** Post Registration health and social care courses
- **18:** First degree leading towards obtaining eligibility to register to practice with a Health or Social Care or Veterinary statutory regulatory body
- **33:** Diploma in HE leading towards obtaining eligibility to register to practice with a Health or Social Care regulatory body

12.7.7 Setting Up Program Categorizations IGSPS019

Enter individual program versions as belonging to the selected program category.

For example, with the program category CL - Chinese Language selected in the Program Categories window, you can place any programs involving the teaching of

Chinese language in this category by adding them in the Program Categorizations region of the Program Categories window.

Prerequisites

Program categories are set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Categorization > Program Categorizations

Additional Notes and Business Rules

Closed program categories: Closed program categories cannot be assigned to a program version.

Changes: Program categories cannot be altered once the program version is made Inactive.

Grouping: Assigning a program category to a program version permits the program version to be grouped with other program versions of the same category.

12.7.8 Setting Up Restricted Funding Sources IGSPS024

Restricted funding sources funding sources against which a student's enrollment in the program version can be funded.

One of the funding sources can be nominated as the default funding source. Students enrolling in the program version would then have their funding source set by default to the default funding source. If this funding source does not have the **Restrict** check box selected, then the default funding source can be overridden at enrollment.

Students enrolling in program versions with no recorded funding source restriction can have their funding source set to any of the available funding sources.

Employer Funded or Special Grant are examples of user-defined restricted funding sources.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Funding Source Restriction > Restricted Funding Sources

Additional Notes and Business Rules

Funding source: If there is more than one funding source, all of them must be selected as Restrict. A closed funding source cannot be restricted. Funding source restrictions cannot be altered once the program version is made inactive. A program version can have more than one restricted funding source.

UK Institutions: The default restricted funding source is used to derive the HESA major source of funding for the program, the **MSFUND** field, field 64 of the combined and student returns.

12.7.9 Setting Up Program Stages IGSPS026

Enter the stages of individual programs, enter an override description for a program, and view the rule applying to a program stage.

Completion of a year of a program is usually considered a measure of progression, but this depends on your business practices. For example, a three-year degree usually has three stages: Year 1, Year 2, and Year 3. However, institutions or organizational units can use this facility to define program stages in any way they want. You then apply rules to determine if a stage is completed.

Program Stage Completion is the only rule in the current Oracle Student System. There is no process that automatically evaluates whether a student has satisfied the requirements of the Program Stage Completion rule.

Prerequisites

Program stage types are set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Stage > Program Stages

12.7.10 Setting Up Program Occupational Titles IGSPS071

Associate programs with professional titles.

Navigation

Program Structure and Planning > Program > Program Occupational Titles

12.7.11 Setting Up Occupational Titles and Related Programs IGSPS072

Query occupational titles.

Navigation

Program Structure and Planning > Program > Occupational Titles and Related Programs

12.7.12 Setting Up UK Statistics Program Tab IGSHE014

Program related data required for reporting to HESA and not captured in Oracle Student System is manually entered in the UK Statistics window. Data must be recorded for the program for a valid student or combined HESA return to be generated.

Prerequisites

IGS: Country Code profile option is set to **United Kingdom**.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > UK Statistics > UK Statistics

Additional Notes and Business Rules

FE Program Marker field: This marker identifies whether the program is an FE program, whether the program is an FE program which attracts an annual fee, or an FE program which attracts a whole course fee. This field which is used when deriving the FE student marker and the Amount of tuition fees received/expected for an FE student is mandatory.

Fundability: This field indicates if funding provided by Funding Council and is used to derive the HESA **FUNDCODE**, field 65 of the student and combined returns.

FTE Intensity: FTE Intensity is percentage of full time equivalence used in student FTE calculation. This field only need be completed if the default FTE of the program is not 100%. The FTE calculation will use the value specified for the program unless an FTE intensity is found for the program offering option unit set or the student unit set attempt.

Teaching Period Start Date: This field indicates the teaching period start date used in FTE calculation if nonstandard teaching for period.

Teaching Period End Date: This field indicates the teaching period end date used in FTE calculation if nonstandard teaching for period.

Bilingual ITT Marker: This field indicates if program leads to bilingual teaching qualification and is used to derive the **BITTM**, field 54, of the student and combined returns. This field is only required to be completed for initial teacher training programs by Welsh, Scottish and Northern Irish institutions.

Use Program for Calculation: If selected, then program and year of program data is used to calculate credit obtained and cost center and subject code proportions. If deselected, unit enrollment data is used. This check box must not be selected for programs that are included in the HESA Student return.

Cost Centre: Record HESA cost centre, subject area, and proportion at the student program attempt level. The cost centre and subject area apportioning at the program level is used to derive the combined return fields 100-147 when the **Use Program for Calculation** check box is selected and there is no cost centre and subject code split for the program offering option unit set, the student program attempt or the student unit set attempt HESA details.

Start and End Dates: The program teaching period start and end dates define the period over which the FTE for students enrolled on this program is apportioned to take account of periods of intermission and early discontinuation. The teaching period only needs to be defined when the teaching period for the program differs from the FTE calendar default teaching period. The teaching period does not have to be defined for research programs because the FTE is apportioned over the full academic year, rather than just the teaching period. For more information on FTE calendars and the FTE calculation process, see *Oracle Student System User Guide*.

Return Type: This field is used to identify the programs for which a reduced return is to be produced. Select a return type from the seeded return types to exclude students enrolled on this program from the full student and combined returns and include them in appropriate reduced return. For more information on defining user returns and reduce returns, see *Oracle Student System User Guide*.

Franchising Activity: This field is used to derive the HESA **FRNCHACT** field, field 165 in the combined return and field 150 in the student return. The field is compulsory within the HESA return so a value should be entered for all programs unless either a field constant has been specified for the field within the return definition, or the default specified for the field within the user return definition does not apply to the program. For example, if you do not run any franchised programs, you may decide to enter a constant, with the value **1 - Institution only** for the field within the user return definition. Doing this would mean that the Franchising activity field at the program, program offering option unit set, and the

student unit set attempt level could be left blank. For more information on the use of field constants, see *Oracle Student System User Guide*.

Fee Band: This field is used to derive the **FEEBAND** field, field 67 or the combined and student returns. The field is compulsory within the return should so a user-defined fee band value should be selected for all programs on which students reported to HESA are enrolled unless the user return field default does not apply to this program or a constant value has been specified for the field within the return definition.

Credit Transfer Scheme: This field is used to derive the **CRDTSCM**, field 91 of the combined returns which is a mandatory field within the HESA return. A value should be selected from the user-defined Credit Transfer Schemes for every program unless a user return field constant has been specified or the default field specified for the field within the return definition does not apply to the program. This field is not used in the generation of a student return.

Level Applicable to Funding Council HESES: This field is used to derive the HESA **FUNDLEV** field, field 154 in the combined return and field 139 in the student return. HESA requires that only English and Northern Irish institutions return a value for this field within the return so Scottish and Welsh institutions can leave this field blank.

Location of Study: This field is used to derive the compulsory HESA **LOCSDY** field, field 71 of student and combined returns. A value should be recorded for all programs for which the user return field default is not applicable to the program or a constant is not specified for the field.

Other Institutions Providing Teaching, 1 and 2 and Proportion not Taught by Institution: These fields only need to be completed if the **Use Program for Calculation** check box is selected. The values recorded will be used to derive fields **TINST1**, **TINST2**, and **PCOLAB** fields 86, 87 and 90, of the combined return.

Proportion of Teaching in Welsh: This field only needs to be entered by Welsh Institutions.

Source of NHS Funding: This field is used to derive the **DHFUND** field which is only required for students who are funded by the Department of Health / NHS / Health Authorities (students who are coded **31** in the **MSFUND**, major source of funding field). This field need not be completed for programs which are not funded by the Department of Health, the NHS or a Health Authority.

Teacher Training Program ID: This field is used to derive the compulsory **TTCID** field, field 53 of the student and combined returns so a value should be recorded for every program unless a default or constant value is being applied. For example, if

you run some teacher training programs, you may choose to enter the appropriate values for the teacher training programs and specify a field default value of **0- Not a teacher training course**. This would mean that you would not have to select the teacher training program ID for non-teacher training programs. For more information on the use of field defaults, see *Oracle Student System User Guide*.

ITT Phase / Scope: This field is used, in conjunction with the value from the student program attempt, to derive the **ITTPHSC** field, field 54 of the student and combined returns. It is only reported for initial teacher training students in English and Welsh institutions so Scottish and Northern Irish institutions can leave this field empty. English and Welsh institutions should complete this field for all initial teacher training programs.

Teaching Qualification Sought Sector, Subject 1, Subject 2, and Subject 3: These fields are used to derive the **TQSSEC, TQSSUB1, TQSSUB2** and **TQSSUB3** fields, fields 56 to 59 of the combined and student returns for Scottish and Northern Irish institutions. These fields need not be completed by Welsh and English institutions.

12.7.13 Setting Up Programs Eligible for Financial Aid IGSPS073

Identify the type of financial aid available for the program.

Prerequisites

Basic program details are set up.

Navigation

Program Structure and Planning > Program > Programs for Financial Aid

Additional Notes

State check box: If the program is not eligible for state financial aid, deselect this check box.

Federal check box: If the program is not eligible for federal financial aid, deselect this check box.

12.7.14 Convert Programs to Active IGSPS013

After programs have been created in **Planned** status, they must be converted to Active status for additional setup. Students can only enroll in an **Active** program.

12.8 Program Offering

A program offering is a program that is made available for an academic calendar.

12.8.1 Setting Up Program Offering IGSPS029

A program offering is created by assigning a program version to a calendar type. Programs can be offered only in calendar types of the **Academic** calendar category. A list of values containing only these calendar types appears in the **Calendar Type** field. A program version can be offered in more than one calendar type, each constituting a different program offering.

For example, a program version is assigned to the Standard Academic Year calendar, indicating that it can be offered in any calendar of that type. The program version can be offered in calendar types such as Standard Academic Year and MBA Calendar for different offerings of the program, allowing different offering options to be applied to the different offerings.

After creating a program offering, specific occurrences of the offering, or program offering instances, can be defined by specifying the particular calendar instance in which the program version is offered. A program offering can have numerous program offering instances.

The Rollover Program Offering Pattern concurrent process performs a bulk rollover of program offering instances and patterns.

For example, a new program offering is created by assigning a program version to the Standard Academic Year calendar type. This program offering can have program offering instances in numerous calendar instances of the Standard Academic Year type. Each instance is specified by entering the calendar instance in which the program version is offered, for example, the standard academic year 01-JAN-2004 to 31-DEC-2004.

Prerequisites

Calendar types are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offering

Additional Notes and Business Rules

Minimum field: The minimum entry assessment score entered in Program Offering Patterns window overrides the value entered in the Minimum field of the Program Offerings window.

12.8.2 Setting Up Program Offering Notes IGSPS031

Attach notes to program offerings.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offering > Program Offering Notes > Program Offering Notes

12.9 Final Program Details

Final program details have dependencies on other program setup. Complete this setup after all programs are set up.

12.9.1 Setting Up Program Categories IGSPS003

Create user-defined program categories. A diverse set of programs, with attributes that cannot be easily selected, can be categorized for inquiry, reporting, and manipulation of programs by category.

Previously created categories can be assigned to a program version for the purpose of grouping program versions.

Navigation

Program Structure and Planning > Program > Program Categories > Program Categories

12.9.2 Setting Up Program Groups IGSPS012

Assign program versions to a program group to categorize similar programs. Each program group is assigned a program group code and a group type that identifies the purpose of the program group and enables additional functionality. Enter organizational unit responsible for the program group.

Prerequisites

Calendar types are set up.

Government program attendance types are set up.

Navigation

Program Structure and Planning > Program > Program Groups > Program Groups

Additional Notes and Business Rules

Reports and queries: Programs added to a program group are included in the program group's functions, reports, and queries. Programs deleted from a program group are not included in the program group's reports or queries.

Deletion: If a program group has members, it cannot be deleted. If a program group has members, only the description can be modified if the change does not affect the meaning of the program group. To prevent further use of a record, the Closed Check box must be selected.

Adding: A program group cannot be added to a closed group type. A program group cannot be added to a closed organizational unit.

12.9.3 Setting Up Primary Program IGSPS122

Set up primary program groups to indicate the rank of the programs in a given program type. This ranking is used to default the primary program for students in the career-centric mode.

Prerequisites

Basic program details are set up.

Program types are set up.

Navigation

Program Structure and Planning > Program > Primary Program Setup

Additional Notes and Business Rules

Primary Program Rank field: Enter the relative position of a program category to other categories.

12.9.4 Setting Up Program Alternative Exits IGSPS016

An alternative exit is a means of leaving your institution without obtaining the intended degree. It is represented by another program version entered in Oracle Student System. Students satisfying the program completion requirements of the

alternative exit can exit their enrolled program with the award for the alternative exit program version.

For example, a Bachelor of Commerce degree can have an alternative exit of a Diploma of Business Administration. This means that students enrolled in a Bachelor of Commerce program could exit that program with a Diploma of Business Administration if they satisfy the program completion requirements of the lesser award.

Prerequisites

Basic program details are set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Alternative Exit > Program Alternative Exits

Additional Notes and Business Rules

Exit version set: Exit version set is the version number that identifies program versions specified by the exit program that are valid as alternative exits

12.10 Units

Unit setup includes setting up data for units and unit sets and mapping this data to government codes. Unit sets are groups of units that are normally associated with a program.

You must set up these user-defined elements before they can use them in other subsystems of Oracle Student System.

The unit elements defined and maintained in the Unit windows include the following:

- Stages of development
- Versions
- Attributes
- Offerings
- Rules
- History

Relationships Required to Define Unit Versions

To create unit versions, the following set up must be complete:

- Government program type
- Program type group
- Program type
- Program unit level
- Unit level
- Unit status
- Unit internal program level
- Organizational unit
- Person

After unit versions are created, the following details are added to further define a unit version:

- Notes
- Unit version notes
- Government discipline groups
- Disciplines
- Unit disciplines
- Organizational unit
- Teaching responsibility
- Reference code types
- Unit reference codes
- Unit category
- Unit categorization

Many of the attributes of a unit version are defined by other data, maintained as reference data. For example, a unit version can be assigned a unit discipline that must be maintained as reference data, and is defined by an appropriate government discipline group.

12.10.1 Setting Up Grading Schemas IGSA025

Set up grading schemas.

See Chapter 19, "Records: Assessments" for more information.

12.10.2 Setting Up Administrative Unit Statuses IGSE001

Set up administrative unit statuses.

See Chapter 15, "Enrollment" for more information.

12.10.3 Setting Up Load Calendar Structure IGSE019

Set up load calendar structure.

See Chapter 15, "Enrollment" for more information.

12.10.4 Setting Up Unit Statuses IGSP042

A unit status defines the state of activity of a unit version. Unit status provides flexibility by permitting the subdivision of system statuses. Each user-defined unit status must be mapped to a system unit status that is recognized by the system for other functionality.

For example, if the term *Current* is a familiar term identifying a unit status at an institution, this can be mapped to the system status *Active*. You can subdivide the system status *Inactive* into *Inactive* and *Sleeping*.

The system unit statuses are *Active*, *Inactive*, and *Planned*. The default is *Active*.

Navigation

Program Structure and Planning > Unit > Unit Statuses > Unit Statuses

Additional Notes and Business Rules

Deletion: A unit status used in the definition of a unit cannot be deleted, only the description can be modified. It is preferable to create a new unit status if the changes in the description are substantial.

12.10.5 Setting Up Unit Levels IGSP043

Unit levels specify the year level in which units are usually attempted for particular program types. This means that a unit version can have a different unit level

depending on the program type associated with it. A unit level is generally applied to, but not restricted to, the year level of the program to which the unit belongs. Individual institutions must determine how unit levels apply to units other than those standard undergraduate, masters, and doctoral programs.

Each unit level can be assigned a weighted average mark weighing factor. This factor can act as a default value, which can be overridden, if weighted average marks are used elsewhere in the system. For example, the value 1 can refer to a unit in year 1 of an undergraduate degree program. Level 5 can refer to a unit in year 1 of a master's degree program. This does not preclude students taking a level 2 unit in the third year of a program.

Unit Internal Program Levels

You can use a weighting system, applied to study units, to model resource allocation to their organizational units. The term, unit internal program level, refers to an attribute assigned to a unit for internal institution purposes in cases where the value is determined according to the type and year level of the program undertaken.

The example describes an application of the weighting system. Units are grouped in terms of program level for Weighted Effective Full-Time Student Units (WEFTSU) when the following is true:

$$\text{WEFTSU} = \text{EFTSU} * \text{discipline.funding_index} * \text{unit_course_level.factor}$$

The following describes an example of the weighting system:

Year 1 & 2 Ug Coursework: 1.0

Other Coursework: 1.2

Hons & Hd Coursework: 1.4

Research: 1.8

Level Unknown: 1.0

Program Unit Levels

As units can be associated with different types of programs, a unit level can be assigned to a unit version for each program type with which it is associated. The program unit levels procedure assigns unit levels to a unit version to identify the year level of a program with which the unit is associated.

For example, a unit HJ13012, Social Science Research Methods, may be taken as a third year subject in the Bachelor of Arts in Justice Administration but as a first year

subject in the Master of Criminal Justice. This unit could have a program unit level of 3 in the undergraduate degree and 5 in the masters degree.

You cannot delete a unit level. You must close the unit level if you do not want it to be used.

Navigation

Program Structure and Planning > Unit > Unit Levels

Additional Notes and Business Rules

Unit level:

- Alphabetic or numeric unit level codes can be used but not both. Unit level codes must be in ascending order from lowest unit level to highest, such as 1, 2, 3, 4 or A, B, C, D.
- If a program attendance mode is assigned to a unit version it cannot be deleted.
- If a unit level is assigned to a unit version, only the description and the weighted average mark weighting can be modified. Oracle does not recommend this unless the change in the description is minor and does not affect the meaning of the unit level.

Weighted Average Mark Weighting field:

- Enter the weighting of unit level for the purpose of weighted average mark calculation.
- This field is only available when Oracle Student System is in program-centric mode.
- If a value is entered, that defaults to the Unit Level Weighting on the Honors Level Basis block of the Awards window.
- The weighted average mark weight represents a number greater than or equal to 0 and less than 10 with three decimal places.

12.10.6 Setting Up Unit Modes IGSPS044

Unit modes are assigned to unit classes to describe the way the class is to be presented to the students. Every user-defined unit mode must be mapped to a system unit mode that is recognized by the system for other functionality.

The system unit statuses are **On**, **Off**, and **Composite**. The default is **On**.

Navigation

Program Structure and Planning > Unit > Unit Modes

Additional Notes and Business Rules

Unit mode: If a unit mode is used in the definition of a unit class, it cannot be deleted. If a unit mode is assigned to a unit class, only the description can be modified. It is preferable to create a new unit mode if the changes in the description are substantial.

12.10.7 Setting Up Unit Categories IGSPS041

User-defined unit categories are a means of classifying and logically grouping unit versions that have like characteristics. The assignment of unit categories to unit versions is optional. Unit versions can be added to or removed from a category as required.

For example, you can have a requirement that all students must complete a unit that provides basic computer literacy. A category CL is created and assigned to qualifying units to indicate that they are part of the set of units that result in basic computer literacy. Units in this category can be used for progression purposes.

Navigation

Program Structure and Planning > Unit > Unit Categories > Unit Categories

Additional Notes and Business Rules

Deletion: A unit category assigned to a unit version cannot be deleted, however, description can be modified. It is preferable to create a new unit category if the changes in the description are substantial.

12.10.8 Setting Up Unit Classes IGSPS045

A unit class is a part of a unit section that may function as a high-level time marker or as a unit section number. User-defined high-level time markers could include Day and Evening. Unit sections cannot exist without unit classes.

Prerequisites

Unit modes are set up.

Navigation

Program Structure and Planning > Unit > Unit Classes > Unit Classes

Additional Notes and Business Rules

Deletion: If a unit class is selected when you set up units, then the unit class cannot be deleted. A closed unit class cannot be reopened if it is mapped to a closed unit mode.

12.10.9 Setting up Unit Internal Program Levels IGSPS046

Create unit internal program level to indicate the weighting of the unit for internal institution purposes in which the value is determined by the level of the program that is undertaken.

Navigation

Program Structure and Planning > Unit > Unit Internal Program Levels > Unit Internal Program Levels

Additional Notes and Business Rules

Unit Internal Program Level: If a unit internal program level is used in the definition of a unit version, it cannot be deleted and only the description and Weighted Effective Full Time Student Units Factor (WEFTSUF) can be modified. It is preferable to create a new unit internal program level if the changes in the description are substantial.

12.10.10 Setting Up Media and Equipment IGSPS080

Enter codes representing media and other instructional equipment in a classroom, such as televisions, computers, video cassette recorders, microphones, white boards, and podiums.

These codes are used in the Facilities tab of the Unit Locations and Facilities window to enter media and equipment needed for unit instruction.

Navigation

Setups > Organizational Structure > Media and Equipment

12.10.11 Setting Up Unit Program Type Level IGSPS108

The unit program type level indicates the program type to which a unit can be applied. You can define a unit program type level code to represent a program type or multiple program types.

You can delete unit program types only when unit program type levels are not associated with any unit. Use the career mode to indicate which career or program type in which the units are applied.

Navigation

Program Structure and Planning > Unit > Unit Program Type Level

12.10.12 Setting Up Activity Types IGSPS117

You might require information about unscheduled contacts in a unit section for funding. For this purpose, enter activities and their activity types, such as out of class discussion or auto tutorial.

Navigation

Program Structure and Planning > Unit Section > Activity Types

Additional Notes and Business Rules

Activity Type: You cannot delete an activity type if a dependent unscheduled contact exists.

12.10.13 Setting Up Basic Unit Details IGSPS047

Unit versions represent a history of changes made to a unit's attributes. Create unit versions when making minor changes to a unit. Institutions create new units for major changes. Each unit or unit version is defined by numerous attributes.

Navigation

Program Structure and Planning > Basic Unit Details

Additional Notes and Business Rules

Unit version number: New units are assigned version number of 1 when record is saved. When creating a new version of the same unit, Oracle Student System automatically assigns the next ascending number

Modify Subtitle at Unit Section Level: If this check box selected, then subtitles can be modified at unit section level. Subtitles are modified in the case of repeatable units. For example, a student enrolls in a unit titled Independent Study. The student's focus is the French Revolution; the unit's subtitle becomes French Revolution. The following year, the same student enrolls again in the Independent Study unit, this time to focus on France during World War II. The unit's subtitle now is WW II France.

Unit Status: You cannot delete records if the unit status is Active or Inactive. You cannot change unit status from Active or Inactive to Planned. You can change a unit status of Planned to Active or Inactive.

Expiry Date: Expiry Date is the date when the unit is no longer available for student enrollment. Students already enrolled remain enrolled.

End Date: This field must be left blank when creating new unit version. An end date is entered only for inactive unit versions. A unit's end date must be greater than or equal to the expiration date if an expiration date is set.

Override Title: If selected, then titles can be overridden at the unit section level.

Cross-Listed: This check box is automatically selected if unit version is included in cross-listed unit group in the Cross-Listed Units Groups window.

Last Calendar Offered: This field indicates the calendar year when the unit version was last offered. This field is updated when the Update Last Offered and Enrolled concurrent process is run.

Last Calendar Enrolled: This field indicates the calendar year when students last enrolled in the unit version. This field is updated when the Update Last Offered and Enrolled concurrent process is run.

Supplemental Exams: If selected, then students enrolled in the unit are subjected to supplementary assessment, in addition to normal assessment. This check box overrides the Supplemental Exams Permitted check box in the Basic Program Details window.

Industrial: If selected, then unit has a government industrial code.

Auditable: If selected, then unit is auditable.

Permission to Audit: If selected, then permission to audit is granted. This check box is enabled only if Auditable check box is selected.

Assessable: If selected, then unit is subject to academic assessment.

Voice Response: If selected, then interactive voice response enrollment is enabled.

CAUTION: Interactive Voice Recognition functionality is not supported for this release and should not be used.

Self Service Enrollment: If selected, self service enrollment where students can directly enrol through internet is enabled.

Special Permission: If selected, then unit requires special permission to override unit maximum seat limits and unit rule restrictions.

Research: If selected, then unit is research unit, as defined by institution

Award Program Only: If selected, then completion of unit results in award, such as diploma or certificate. Selection also indicates that enrollment is open to award programs only.

Placement: If selected, then unit is of a practical nature, and you can enter the placement details for students.

Reenroll for Credit Allowed: If selected, then re-enrollment for the unit version and receive academic credit is enabled.

Exclude From Self Service Display: If selected, then units are not displayed in self service.

Anonymous Unit Grading: If selected, then anonymous unit grading is enabled. This option can be disabled at the unit section level.

Anonymous Assessment Grading: If selected, then anonymous assessment grading is enabled. This option can be disabled at the unit section level.

12.10.14 Setting Up Basic Unit Details - Create Occurrence IGSPS047

Create unit occurrences.

Prerequisites

Units are in **Active** status.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Section Details > Occurrences > Unit Section Occurrences

Additional Notes and Business Rules

Nonstandard unit section occurrences with meeting days:

- Calculate total number of actual meeting days within and including the unit section start and end dates based on unit section occurrences. Exclude holidays from this total per date aliases created on the Holiday calendar. If multiple meeting patterns exist on the same day, count the day as one. For example: There are two meeting patterns on Friday, however Friday should be counted only once.
- Multiply number of meeting days that you have just calculated by a percentage that you enter on the window. Round accordingly. Add this result to Unit Section Effective Start Date, and count the start date as 1. If occurrences do not include Saturday or Sunday, ignore those days in this calculation. If occurrences do include Saturday or Sunday, include those days in this calculation. If Offset Constraints exist, include those parameters in this calculation.
- Example:
 - Total number of actual meeting days = 18 (number of MWF occurrences between
 - 29-JAN and 09-MAR)
 - Offset Days = $18 * 30\% = 5.4$, round to 5 (assume Standard Round)
 - Variation Cutoff Deadline = 29-JAN + 5 MWF occurrences = 07-FEB-2001

12.10.15 Teaching Responsibility IGSPS048

Typically, an organizational unit owns an unit. There might be multiple organizational units that are responsible for teaching aspects of the unit.

For example, the History department might own a History of Oil Painting class. However, the History department and the Art department can both allocate resources to teach the class.

Prerequisites

Organizational units are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Teaching Responsibility > Teaching Responsibilities

Additional Notes and Business Rules

Organizational Unit Code: Only active organizational unit codes are displayed in this field.

Percentage: The total percentage of responsibility assigned to organizational units for a unit version must equal 100.

12.10.16 Setting Up Unit Grading Schemas IGSPS077

A grading schema describes a set of grades, marks, and results available for the assessment of student unit attempts. You can create multiple grading schemas.

Assign unit grading schemas to a unit. More than one grading schema can be assigned. Only the grading schema set up in this window will be available at the unit section level.

Prerequisites

Grading schemas are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Grading Schemas > Unit Grading Schemas

12.10.17 Creating Unit Enrollment Limits IGSPS047

Create enrollment limits.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Enrollment Limits

Additional Rules and Business Rules

Enrollment Maximum: This field is the maximum number of students that can enroll in unit. You cannot update this field after the maximum enrollment number is attained.

Enrollment Minimum: This field is the minimum number of students that must enroll in unit for it to be offered. Data in this field does not validate any other data in the system.

Advance Maximum: This field is the maximum number of students that can enroll in unit during period of pre-enrollment. After the advance maximum is reached, additional students who attempt to enroll during pre-enrollment are waitlisted if waitlisting options are enabled.

Enrollment Expected: This field is the total number of students expected to enroll in unit. This field is used for planning purposes. Data in this field does not validate any other data in the system.

12.10.18 Setting Up Unit Discipline IGSPS049

Define the discipline groups to which a unit version belongs. A unit version can belong to several user-defined unit disciplines. Typically, most unit versions are not assigned to more than one or two unit disciplines.

Prerequisites

Disciplines are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Discipline > Unit Disciplines

Additional Notes and Business Rules

Changes: You cannot alter discipline groups if unit status is **Inactive**.

Percentage: If the unit version belongs to only one discipline, enter 100 in the % field. If the unit version belongs to more than one discipline, enter the proportional percentage of the unit version allocated to this discipline. The total percentage of unit disciplines assigned to a unit version must equal 100.

12.10.19 Setting Up Unit Fields of Study IGSPS074

Create user-defined fields of study and assign a field of study to a unit for information purposes.

Prerequisites

Fields of study are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Fields of Study

Additional Notes and Business Rules

Changes: You cannot assign fields of study to **Inactive** units.

12.10.20 Setting Up Program Unit Levels IGSPS050

As units can be associated with different types of programs, a unit level can be assigned to a unit version for each program type with which it is associated. Assign unit levels to a unit version to identify the year level of a program with which the unit is associated.

For example, a unit HJ13012, Social Science Research Methods, may be taken as a third year subject in the Bachelor of Arts in Justice Administration but as a first year subject in the Master of Criminal Justice. This unit could have a program unit level.

This window is only available when Oracle Student System is in program-centric mode (either program or Year of Program) and it provides two functions:

- **Unit Level Override by Program:** If a unit has an entry, the unit level is overridden by the unit level value for program attempts.
- **Weighted Average Mark Weighting:** The standard weighting for the unit mark is to multiply the unit mark by the ratio of the unit credit and the total unit level credits. A value entered into Weighted Average Mark Weighting will alter the value of the average unit mark in respect to other units in the level. Weights of less than one reduce the average unit mark and weights greater than one increase the average unit mark.

Prerequisites

Program types are set up.

Unit levels are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Program Unit Level > Program Unit Levels

Additional Notes and Business Rules

Changes: Program unit levels cannot be altered if the unit status is *Inactive*.

Unit Level: A unit level or unit version relationship cannot be deleted if it is used elsewhere in the system. For example, if students are enrolled in the unit version and program type, it is unlikely that a unit level associated with a unit version would change for a given program type. It is more likely that a new unit version is created. You are advised to make changes in this window only to amend incorrectly entered data. Unit level must not be closed.

Weighted Average Mark Weight: The Weighted Average Mark Weight represents a number greater than or equal to 0 and less than 10 with three decimal places. It is the override value that is applied to the level mark calculation for this unit.

Program versions: Different program versions may have different unit level values or weightings.

12.10.21 Setting Up Unit Categorizations IGSPS052

Unit categories can be assigned to unit versions to group them according to like characteristics. Assigning unit categories to unit versions is optional.

Prerequisites

Unit categories are set up.

Navigation

Program Structure and Planning > Basic Unit Details

Additional Notes and Business Rules

Changes: Unit categories cannot be altered for inactive units.

Unit version: A unit version can be associated with any number of unit categories.

12.10.22 Setting Up Unit Reference Codes IGSPS053

Unit reference codes are additional information about the unit. These codes might be information from another system, or information about the unit that you want to capture.

Each unit is identified by a unit code and version number. Alternative reference codes can be used to associate user-defined details with these unit versions.

If the Unit is selected as an Applicable level and the Mandatory check box for a reference code type is selected in the Reference Code Types window, the default reference code type is automatically attached to the unit. Such reference codes are displayed as General Unit Reference codes in the Unit Reference Codes window.

You can also capture specific unit requirement information using reference codes. These unit requirement reference codes are displayed in self-service.

Note: For units that need to be included in statistics calculations, a reference code of **Stats** must be attached to the unit.

Prerequisites

Reference code types are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Reference Code > Unit Reference Codes

Additional Notes and Business Rules

Reference Code: This field is displayed only if the **Restricted Reference Code Value** check box is selected in the Reference Code Type Setup window. You can enter reference codes in this window if the **Restricted Reference Code Value** check box is not selected. The default reference code set in Reference Code Types window is displayed in this field.

12.10.23 Setting Up UK Statistics Unit Tab IGSHE014

Unit related data required for reporting to HESA that is not captured in Oracle Student System is manually entered in the Unit tab of the UK Statistics window. Data must be recorded for each unit reported in the module return for a valid module return to be generated.

Prerequisites

IGS: Country Code profile option is set to **United Kingdom**.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > UK Statistics > UK Statistics

Additional Notes and Business Rules

Credit Transfer Scheme: This field is used to derive the **CRDTSCM**, field 8 of the Module return which is a mandatory field within the HESA return. A value should be selected from the user defined Credit Transfer Schemes for every unit unless a

user return field constant has been specified or the default field specified for the field within the return definition does not apply to the unit.

Location: This field is used to derive field 3, **CAMPID**, Campus Identifier of the module return. A user-defined Oracle Student System campus should be selected for every unit unless a user return field constant has been specified or the default field specified for the field within the return definition does not apply to the unit. For example, if the majority of your units are taught on one campus, you may choose to the default campus identifier when defining the user return and then just enter the location for the individual units that are not taught on this campus. For more information on the use of field defaults, see *Oracle Student System User Guide*.

Module Length: Complete this field if you want to return a value for field 011, **Module length**, of the module return.

Proportion of Teaching in Welsh: This field only needs to be entered by Welsh Institutions. The field is used to complete fields 101-116, **Module 1 proportion of teaching in Welsh**, and **Module 16 proportion of teaching in Welsh** of the student return. The value entered should be in the range 0-100.0

Proportion of FTE: This field is used in the derivation of field 6 of the Module return. Enter a value in the range 000.0 to 100.0, if a value is not entered the module FTE is derived from the enrolled credit points.

Unit level recording: You can record the HESA cost centre, subject area, and proportion at the unit level. The sum of the proportions must equal 100. If the **Use Program for Calculation** check box is not selected and a combined return is being produced, the unit cost centre and subject apportionment will be used in place of the program or year of program cost centre and subject apportionment to derive fields 100 to 147. If you submit to HESA, the student and module returns the unit cost centre and subject apportionment is used to derive fields 12 to 17 of the module return.

12.10.24 Setting Up Unit Locations and Facilities IGSPS081

Assign a location, media, and equipment needed for instruction to a unit.

Codes representing locations where a unit is offered are set up in the Locations window. Codes representing media and other instructional equipment in a classroom, such as televisions, computers, video cassette recorders, microphones, white boards, and podiums, are set up in the Media and Equipment window.

Prerequisites

Organizational units are set up.

Media and equipment are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Location and Facilities

Additional Notes and Business Rules

Inactive units: Location, media, and equipment cannot be assigned to an inactive unit.

12.10.25 Setting Up Unit Curriculum IGSPS104

Curriculum units are units that are classified as a previous offering of the unit. You can change the unit code due if the curriculum changes for your institution. Curriculum units allow to you tie old units to new unit offerings.

Navigation

Program Structure and Planning > Unit > Unit Curriculum

Additional Notes and Business Events

Curriculum ID: The value entered in this field must be unique. This value might be system generated if the profile option is set for system generated.

12.10.26 Setting Up Unit Version Notes IGSPS054

Attach notes to unit versions.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Version Notes > Unit Version Notes

12.10.27 Setting Up Basic Unit Details Planned to Active IGSPS047

Map user-defined unit statuses to system unit statuses.

The table describes system unit statuses.

Table 12–6 System Unit Statuses

System Unit Status	Description
Active	Can be changed to Inactive only Status cannot be changed to Active if inactive or planned superior units exist Only one version of an active unit and unset expiration date can exist
Inactive	Can be changed only to Active; system checks related unit offerings and displays a message if closed or missing reference data is found; correct data must be entered before status becomes Active, or new version must be created Status cannot be changed to Inactive if active or planned subordinate units exist Unit status can be changed to Inactive only when end date is entered Details of inactive unit version cannot be modified
Planned	Details have been recorded, but unit is awaiting official approval and a change to Active status Can be changed only to Active or Inactive In order to move the unit from a planned status to an active status, the following elements are needed: <ul style="list-style-type: none">■ Teaching Responsibility■ Unit Discipline■ Unit Grading Schema■ Unit Credit Points and Hours

Set basic unit details to **Active** in the Basic Unit Details window. See Setting Up Basic Program Details IGSPS013 for more information.

12.11 Unit Offering

A unit offering is a unit that is made available for a specific teaching period.

After creating a unit offering, specific occurrences of the offering, or unit offering patterns, can be defined by specifying the particular calendar instance in which the unit version is offered.

The Rollover Unit Offering Pattern and Unit Section concurrent process performs a bulk rollover of unit offering patterns and unit sections.

12.11.1 Setting Up Unit Offering IGSPS055

Unit offerings are the units that you want to be offered during a specific teaching period that is set up in the Calendar subsystem. A unit offering is created by assigning a unit version to a calendar type. Units can be offered only in active calendar types of the Teaching calendar category. A list of values containing only these calendar types appears in the Calendar Type field. A unit version can be offered in more than one calendar type.

Unit offering patterns indicate the availability of a unit version in the term of attendance mode and type.

Prerequisites

Program and unit note types are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Offerings

Additional Notes and Business Rules

Closed calendar types: Unit offerings cannot be assigned to closed calendar type. A query can display unit offerings assigned to closed calendar types.

Dependent children records: If a unit offering or a unit offering pattern has dependent children records, it cannot be deleted.

Unit Offering Patterns: A unit offering can have numerous unit offering patterns. Unit offering patterns cannot be modified.

Active calendar instances: Units can be offered only in active calendar instances.

Waitlist Allowed: If **Waitlist Allowed** check box is selected, then waitlist is allowed for a unit offering. This field is enabled only if **Waitlist Allowed** is selected for the calendar and associated organizational unit in the Organizational Unit Waitlist Setup window. You cannot deselect this check box after a student is waitlisted. This check box is disabled after the maximum number of students allowed for waitlist is attained.

Maximum Students Per Waitlist: This field is defaulted with the value set at the organization level if at all any exists. You can override the defaulted value.

CAUTION: Inactive calendar instances: Changing calendar status to Inactive makes the unit offering instance inactive, preventing new offering patterns from being assigned to them, and students from enrolling in them.

12.11.2 Setting Up Unit Offering Pattern Notes IGSPS057

Enter notes for unit offering patterns.

Prerequisites

Program & unit note types are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Offerings > Unit Offering Pattern Notes > Unit Offering Pattern Notes

12.11.3 Setting Up Unit Offering Notes IGSPS056

Enter notes for unit offerings.

Prerequisites

Program and unit note types are set up.

Navigation

In Oracle Student System, the Text Notes window is accessible through multiple navigation paths.

12.12 Unit Section

Unit Section setup includes setting up data for unit sections, including cross listing, enrollment limits, and media requirements information, among other types of data.

You must set up user-defined elements before you can use them in other subsystems of Student System.

Unit level information is inherited by unit section. If the information is the same for the unit section level, then you do not need to set it up at the unit section level. However, if the information is different for the unit section, then you will have to set it up at the unit section level. Oracle Student System looks at the unit section level information first, and then at the unit level.

Information at the unit section level takes precedence over information at the unit level. If the unit section level has no information, the unit level information is inherited.

CAUTION: If data has been manually set up at the unit section level, the changes made at the unit level will not be reflected at the unit section level. Manual changes will have to be performed at the unit section level as well if these changes are required at the unit section level.

The unit section elements defined and maintained in the Unit Section windows include the following:

- Stages of development
- Versions
- Attributes
- Structures
- Discontinuations
- Rules
- History

Unit Section Rollover

To reduce the work involved in maintaining curriculum and associated data, Oracle Student System provides rollover functionality by which existing unit section information can be used to create new unit sections based on existing unit sections. Run the Rollover Unit Offering Patterns and Unit Sections concurrent process to roll over unit sections. Alternatively, in the Unit Offering window, you can choose to copy over the previous setup.

Unit Section Attributes

Unit sections further define the attributes for a particular unit. For example, a unit section indicates a teaching period for a particular unit.

The attributes defined at the unit section level include the following:

- Unit section notes
- Credit points
- Repeat conditions
- Cross listings

- Grading schema
- Location
- Financial aid eligibility
- Enrollment limits and waitlists
- Assessments
- Assessment items

12.12.1 Setting Up Non-Standard Unit Section Enrollment Deadlines IGSEN053

A non-standard unit section is one that is of shorter duration than the teaching period in which it occurs. For these unit sections a different enrollment deadline can be calculated if needed.

Define the formula for calculating the enrollment deadline setup date. The enrollment deadline setup date is calculated based on the offset date.

Query the deadline date offset constraints for a function and an offset date. For example, if the system date offset constraint type is defined as Monday, then that offset date falls on Monday. If the condition is Must, the number given as the resolution days number decides the offset date.

Prerequisites

Organization structure data setup is set up.

Navigation

Enrollments > Setup > Non-Standard Unit Section Enrollment Deadline Setup > Non-Standard Unit Section Enrollment Deadline Setup > Offset Constraints > Enrollment Deadline Date Offset Constraints

Additional Notes and Business Rules

Function: Function creates a modified deadline.

Definition Level: Define the formula for either an institution or organizational unit.

Organizational Unit: You must select Organizational Unit, if organizational unit is selected in Definition Level field. A value is displayed only if Definition Level is equal to Organizational Unit.

Formula Method: The formula method is the duration days or meeting days. The formula method determines the type of calculation performed on the Unit Section Details window for non-standard unit sections.

Round Method: Select either Standard Round or Always Round Up. Select Standard Round to round to the nearest number. For example, 35.43 = 35. Select Always Round Up to round to the next round number. For example, 35.4 = 36.

Offset Constraints: This button opens the Enrollment Deadline Date Offset Constraint window.

12.12.2 Setting Up Enrollment Deadline Offset Constraints IGSEN055

Create, modify, or delete deadline date offset constraints. Based on the offset date, the enrollment deadline setup date is calculated.

To create discontinuation date offset deadline constraints, define system date offset constraint type, must condition or must not condition, and resolution days.

Navigation

Enrollments > Setup > Non-Standard Unit Section Enrollment Deadline > Enrollment Deadline Date Offset Constraints

12.12.3 Setting Up Non-Standard Unit Section Discontinuation Deadlines IGSEN054

Define the formula to be used to calculate discontinuation deadline setup date. Because a non-standard unit section does not have the same duration as the teaching period, you can calculate a different discontinuation date. Based on the offset date, enrollment deadline setup date is calculated.

Prerequisites

Unit statuses are set up.

Organizational units are set up.

Navigation

Enrollments > Setup > Non-Standard Unit Discontinuation Setup > Non-Standard Unit Section Discontinuation Setup

Additional Notes and Business Rules

Definition Level: Define the formula either for an institution or organizational unit.

Organizational Unit: You must select Organizational Unit, if organizational unit is selected in Definition Level field. A value is displayed only if Definition Level is equal to Organizational Unit.

[Formula Method]: The formula method is the duration days or meeting days. It determines the type of calculation performed on the Unit Section Details window for non-standard unit sections.

[Round Method]: Select either Standard Round or Always Round Up. Standard Round rounds to the nearest number. For example, 35.43 = 35. Always Round Up rounds to the next round number. For example, 35.4 = 36.

Offset Constraints: Opens Enrollment Deadline Date Offset Constraint window.

12.12.4 Setting Up Discontinuation Deadline Date Offset Constraints IGSEN056

Create new discontinuation deadline date offset constraints to change the discontinuation dates that you have previously set up using date aliases.

Navigation

Enrollments > Setup > Non-Standard Unit Section Discontinuation Deadline Setup
> Non-Standard Unit Section Discontinuation Deadline **Setup**

12.12.5 Setting Up Unit Sections IGSPS058

A unit section, or unit offering option, identifies a unit by its location, unit mode, which is the mode of delivery, and unit class (unit section number or high-level time indicator). Unit modes are associated with unit sections indirectly; the direct association is with unit class.

Prerequisites

Locations are set up.

Unit classes are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Offerings > Unit Sections > Unit Sections

Additional Notes and Business Rules

Planned status: You can delete unit sections with a status of Planned. After the unit section status is changed to any status other than Planned, it cannot be reset to Planned.

Location: To create a unit section, the system location type must be Campus.

Voice Response Enrollment: If selected, then students can enroll in a unit section through an interactive voice response enrollment.

CAUTION: Interactive Voice Recognition functionality is not supported for this release and should not be used.

Self Service Enrollment: If selected, then students can enroll in a unit section through the self-service enrollment facility.

Exclude from Self Service Display: If selected, then students cannot enroll in this unit section using self-service.

Offered: If selected, then the unit section is approved and offered at this time. This must be selected for students to be able to enroll in the unit section.

Grading Scheme Precedence: If selected, then the unit grading schema takes precedence over the program offering pattern grading schema. If a program offering pattern grading schema is entered, it takes precedence over the unit grading schema unless the Unit Grading Schema Precedence check box is selected. If a program offering pattern grading schema has precedence, recommended unit attempt grades are translated from the unit grading schema to the program offering pattern grading schema by the Translate Student Unit Attempt Outcomes concurrent process.

Call Number: If the IGS: Call Number for Unit Section profile option has been set to automatically assign call numbers, Oracle Student System automatically fills a call number. If the profile option has been set to enter user-determined call numbers, you must enter a number. A call number must be unique within a teaching period. The same call number can be used in different teaching periods. A call number can be any number from one to ten characters in length. If less than ten characters are used, the system does not display leading zeroes. If **None** is selected in the profile option, this field is disabled.

12.12.6 Setting Up Unit Section Grading Schemas IGSPS082

Map a grading schema that you have previously set up in the Grading Schema window to a unit section.

A grading schema describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist for an institution. The list of values is restricted to the values setup for units in the Unit Grading Schemas window.

Prerequisites

Unit grading schemas are set up.

Grading schemas are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Grading Schemas

Additional Notes and Business Rules

Multiple grading schemas: More than one grading schema can be assigned to a unit in the Unit Grading Schemas window.

Override Value: The grading schema is inherited from the unit level. To change the grading schema, click this button. By clicking this button, the inheritance is removed between the unit and unit section.

12.12.7 Setting Up Teaching Responsibility Override IGSPS059

Override the teaching responsibility details for a unit section when they are different from the standard unit version teaching responsibility established in the Teaching Responsibilities window.

Prerequisites

Organizational units are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Offerings > Unit Sections > Unit Sections > Teaching Responsibility Overrides > Teaching Responsibility Overrides

Additional Notes and Business Rules

Percentage: The total percentage of responsibility assigned to organizational units for a unit version must equal 100.

12.12.8 Setting Up Unit Section Details IGSPS083

A unit section is a discrete offering option of a unit, differentiated by location, unit mode, and unit class. There can be an unlimited number of sections for each unit.

Each unit section is defined by numerous attributes that are inherited from the parent unit. Some may be modified at the unit section level. The Find Unit Sections window is used to query a specific unit section. The Unit Section Details window displays the details for the queried unit section and contains buttons that open several attribute windows.

If students are already enrolled in a unit section, the only way to change the status of that unit section is to drop the students from the section, make the status change, and then re-enter them in the unit section.

The following describes lists of unit section statuses:

- **Cancelled:** Cancelled unit section
- **Closed:** Closed unit section
- **Full - Waitlist Allowed:** Full unit section enrollment, waitlisting accepted
- **Hold:** Open unit section, students on waitlist
- **Open:** Open unit section
- **Planned:** Planned unit section
- **Not Offered:** Not offered for enrollment

Prerequisites

Person details are set up.

Locations are set up.

Organizational units are set up.

Reference code types are set up.

Special requirements are set up.

Buildings are set up.

Rooms are set up.

Activity types are set up.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Find Unit Section > Unit Section Details

or

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Sections > Unit Section Details

Additional Notes and Business Rules

Call Number: Call Number is a short reference to the unit section, incorporating the unit code, version, class, and mode; location, calendar type, start and end dates, and is unique across a load calendar.

Unit Section Status: You must update the unit section status when the unit section enrollment maximum and maximum students per waitlist are increased in the Unit Section Enrollment Limits and Waitlist window.

Cross-Listed: This check box is automatically selected if unit section is included in the cross-listed group.

Effective dates: Enter dates if the start and end date for the unit section are different from the teaching period start and end dates.

Special Permission: If selected, then special permission is required for enrollment.

Attendance Required: If selected, then attendance is required for unit section.

Non Standard Unit Section: If selected, then unit section will not span across a teaching period and will have different start and end dates. A standard unit section has the same effective dates as the teaching period attached to it.

Auditable: If selected, then unit section is auditable.

Permission to Audit: If selected, then permission is required to audit unit section. This check box is only enabled if the auditable check box is checked.

Relationship Type: Indicates if unit section is a superior, subordinate, or none. If the unit section has a superior unit section, then this field is Subordinate. If the unit section has subordinate unit section, then this field is Superior. You can enter other subordinate unit sections to the superior unit section even if the unit section itself is a subordinate unit section. The default value is none.

CAUTION: You must update the unit section status if changes are made to Maximum Students per Waitlist and Maximum Enrollment in the Unit Section Enrollment Limits, Waitlist and Reserved Seating window.

Status changes:

- You cannot change the status of an open unit section to Full Unit Section, Accepting Waitlisting if the waitlist is defined at unit section level and waitlist is not allowed or if actual enrollment is less than maximum enrollment.
- You cannot change the status of a closed unit section to Full Unit Section, Accepting Waitlisting if waitlist is defined at the unit section level and waitlist is not allowed or if actual waitlist is greater than maximum waitlist.
- You cannot change the status of Full Unit Section, Accepting Waitlisting to Open Unit Section if the actual waitlist is greater than zero or actual enrollment is greater than or equal to maximum enrollment.

Invalid status changes:

- Canceled Unit Section to Closed Unit Section
- Canceled Unit Section to Full Unit Section, Accepting Waitlisting
- Planned Unit Section to Closed Unit Section
- Planned Unit Section to Full Unit Section, Accepting Waitlisting
- Closed Unit Section to Planned Unit Section
- Full Unit Section, Accepting Waitlisting to Planned Unit Section

Manual changes: You cannot manually change a status to **Not Offered**.

12.12.9 Setting Up Unit Section Credits Points IGSPS086

Query, define, and maintain a specific number or range of credit point values for each unit section. Credit point attributes are inherited from the parent unit and can be modified at the unit section level.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Credit Points > Unit Section Credit Points

Additional Notes and Business Rules

Variable credit points: The override credit points that you set up defines the variable credit points functionality. You can allow students to select the credit points for the unit within the range of the variable credit point.

Override check box: This value is defaulted from the unit level. If selected, then the override maximum, minimum and increment values must be entered.

Override Credit Increment: Allowable increment by which override credit points can be specified. This field is only available if the Override Credit Point check box is checked.

Override Credit Point Minimum: Minimum credit points allowed for a unit section. This field is only available if the Override Credit Point check box is checked.

Override Credit Point Maximum: Maximum credit points allowed for a unit section. This field is only available if the Override Credit Point check box is checked.

Continuing Education Units: Credit point values associated with a unit section that do not grant regular academic credit

Exclude from Max Credit Point Limit: If the Exclude from Max Credit Point Limit check box is selected, then a unit is excluded from the maximum credit point limit.

Override Value: Click the **Override Value** button to enter data in fields populated by inherited data.

12.12.10 Setting Up Unit Section Reference Codes IGSPS091

Create and maintain alternative, user-defined reference codes by which a unit section can be identified. Reference codes are useful in identifying additional information that needs to be captured.

For example, when a unit section is displayed in the Unit Section Details window and the **References** Button is clicked, this window displays the same unit section as the context record and any existing reference codes relating to this record.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Reference > Unit Section Reference Codes

Additional Notes and Business Rules

Override Value: The reference code is inherited from the unit level. To change the reference code, click this button. By clicking this button, the inheritance is removed between the unit and unit section.

12.12.11 Setting Up Unit Section Notes IGSPS060

Enter notes for unit sections.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Sections > Unit Section Notes

12.12.12 Setting Up Unit Section Categorizations IGSPS103

Categorization enables the cross referencing of units or unit sections. Associate units and unit sections with departments or subject areas outside the unit's owning organization, while creating a published program schedule or class schedules.

For example, the schedule can contain a subject area called Environmental Studies, but all the unit sections that appear are actually owned by other organizational units such as Biology, Business Administration, or Sociology.

Prerequisites

Unit Categorizations are set up.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Categories > Unit Section Categorizations

Additional Notes and Business Rules

Category: Categories can be queried if the unit section status is Cancelled. Categories cannot be inserted or updated if the status is Cancelled.

12.12.13 Setting Up Unscheduled Contact Lists IGSPS118

Enter information about the unscheduled contacts in a unit section for funding purposes. Information that you can record is time and percentage of rooms that students or faculty members use. Sometimes, rooms are not scheduled by date, day, or time. In this case, the contact list is considered unscheduled.

This information can be used for government reporting purposes to obtain funding.

Navigation

Unit Section > Unit Section Details > Plus Hours > Unit Section Unscheduled
Contact List

12.12.14 Setting Up Unit Section Special Fees IGSPS132

Enter special fees for specific unit sections. Special fees include lab fees, fees for specific situations within the unit section, and other fees not included in the Student Finance subsystem. These special fees are entered for the specific unit section.

Navigation

Program Structure and Planning > Unit Section Details > Special Fees

Additional Notes and Business Rules

Fee Type field: This field has the fee calendar instance associated with it. This fee calendar instance is mapped to load calendar instance, to which the teaching period of the unit section is associated. The same fee type cannot be selected twice for the unit section. Fee types are system fee of type **Special Fees**, and set up in Student Finance.

Amount field: The Amount field is mandatory if you enter a value in the Fee Type field. The value must be between 0 and 9999.99.

Unit attempt: After you create a unit attempt for the unit section, you cannot update (create, modify, or delete) any record in this Special Fee window. Unit attempts include: Enrolled, Waitlist, Invalid, Dropped, Discontinued, Duplicate, and Complete.

Closed fee types: You can close any fee type associated with the unit section prior to enrollment.

Special fee rollover: When the unit section rolls over, the special fees also roll over.

CAUTION: If the fee type associated with the original unit section does not exist, the fee type does not roll over. For example, the unit section is MATH101.1/TP SU AY04/Belmont/On Campus. The Load Period is mapped to the Teaching Period TP SU AY04 = TERM SU AY04. The Fee Period is mapped to the Load Period TERM SU AY04 = FEE SU AY04. You select and associate the following Fee Types to the Unit Section:

- Lab Fee 250
- Field Trip 100

If you try to roll over the unit section from TP SU AY04 to TP FALL AY04, (TP FALL AY04 is associated to TERM FALL AY04, and TERM FALL AY04 is associated with FEE FALL AY04), then Oracle Student System determines whether Lab Fee and Field Trip exists for FEE FALL AY04. If these fees do not exist, then these special fees are not rolled over to TP FALL AY04.

If Lab Fee is associated with FEE FALL AY04, but Field Trip is not associated with FEE FALL AY04, then Lab Fee will be rolled over, but Field Trip will not.

Setup: Any special fees to be assessed for a unit section should be set up before the unit section is made available for student enrollment. After even a single enrollment record is created for the unit section, no insertions or updates are allowed for special fee setup for the unit section.

12.12.15 Setting Up Unit Section Relationships IGSPS131

Enter relationships between unit sections. For example, if your business processes state that completion of a unit section is dependent on successful completion of another unit section, this type of dependency can be represented using relationships.

It is recommended that you set up credit points at either the superior or subordinate level. Relationships indicate whether the unit section is in a superior or subordinate relationship with another unit section. If the enrolled credit points and achievable credit point are set at both superior and subordinate level, then Oracle Student System uses credit points for all unit sections at both superior and subordinate level for fee calculation, attendance type, and enrollment.

For example, if you want to only count the enrolled credit point of the superior unit section for enrollment credit point limit, then the you should set up the enrolled credit point for the subordinate unit section to be 0.

If you want to count the superior and subordinate unit sections for enrollment limit, then the enrolled credit point of the superior and subordinate unit section should be set greater than 0.

If you only want to include the subordinate unit sections into the calculation of GPA, then the achievable credit point for the subordinate unit section should be set. The superior unit section achievable credit point should be 0.

Navigation

Program Structure and Planning > Unit Section Details > Relationships

Additional Notes and Business Rules

Unit Code: Valid unit code values include active unit sections that belong to the same load calendar as the superior unit section.

Automatic population: The following fields are automatically populated when you enter a unit section in the **Unit Code** field:

- Unit Version
- Location
- Unit Class
- Teaching Period Description

Default Enroll: The **Default Enroll** field determines whether the subordinate unit sections will be enrolled by default when the superior unit section is being enrolled.

Default: If a unit section does not have relationships established, then the unit section context information is defaulted into the superior section.

Cross Listed Groups: Unit sections available for relationships do not include unit sections that are part of a cross listed group.

Existing relationships: If a unit section already has a relationship, you cannot select that unit section to be in a different relationship. If the unit section already has a relationship, the relationship information is displayed. You can enter other subordinate unit sections to the superior unit section via the relationship form of a subordinate unit section.

Restrictions: A subordinate unit section cannot belong to more than one superior unit section. A unit section can only be a superior unit section or a subordinate unit section, it cannot be both.

Relationship Type: The **Relationship Type** field in the **Unit Section Details** window is automatically populated based on: If the unit section is a superior unit section and you enter a subordinate unit section, when you save your work, the **Superior** relationship type is populated. If the unit section is added to a superior unit section relationship, when you save your work, the **Subordinate** relationship type is populated. If the unit section does not have any subordinate unit section, the **None** relationship type is populated.

Load calendar: The subordinate unit sections must belong to the same term (load calendar) as the superior unit section. If the superior unit section spans across multiple terms, then the subordinate unit sections must belong to one of the terms.

Enrollment validations: The relationships structure has no impact in the standard enrollment validations. All current enrollment validations apply to the unit sections regardless if they are in a superior structure.

Relationship modification: If there is any enrollment activity (include all unit attempt status, enrolled, waitlist, completed, discontinued, dropped, duplicated, invalid and unconfirmed), then you cannot modify the relationship.

Not Offered unit section status: All unit section statuses except **Not Offered** allow you to modify the unit section relationships.

Disabled relationships: You cannot create a subordinate relationship if the corresponding unit section is used in a teaching calendar.

12.13 Unit Section Occurrence

Unit section occurrences provide the details of unit sections. For example, a unit section occurrence indicates a building for a particular unit section occurrence.

The attributes defined at the unit section occurrence level include the following:

- Meeting pattern
- Time
- Building
- Room
- Start and end dates
- Notifications

Scheduling details also includes:

- Facilities
- Preferred region
- Scheduled building and room
- Instructor
- Dedicated building and room
- Preferred building and room

12.13.1 Setting Up Unit Section Occurrence IGSPS084

Schedule unit section occurrences details such as meeting days, dates, time, multiple instructors, building, and room.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Occurrences > Unit Section Occurrences

Additional Notes and Business Rules

To Be Announced: If selected, then unit section occurrences are yet to be announced. If the To Be Announced check box is selected, you need not enter any values in the Day and Time fields at the Unit Section Occurrences level while creating a Unit Section Occurrence.

No Set Day: If selected, then there is no set day for the occurrence. After this check box is selected, you can only enter the start and end date of the occurrence

1, 2, 3, 4, 5, 6, 7: If these check boxes are selected, then day of the week starting Monday; for example, 1 = Monday, 2 = Tuesday, 3 = Wednesday and so on are selected. In the Days field, at least one check box must be selected before a record can be saved.

Total Days: In this field, the system calculates the total number of days for the selected days of the week between the unit section start and end dates.

Include Instructor Change in Notification: If selected, then instructor change information is included in the notification.

Cancel Schedule: If selected, then unit section occurrence schedule is cancelled. This check box impacts the Scheduling concurrent process.

Schedule Current: Button is only available if the profile option for install scheduling software is set to **Yes**.

Schedule Set: Button is only available if the profile option for install scheduling software is set to **Yes**.

Notify Current: Notifies instructors and the corresponding administration officials and students about the unit section occurrence.

Notify Set: Notifies instructors and the corresponding administration officials about the complete set of unit section occurrences for the unit section.

12.13.2 Setting Up Scheduling Details IGSPS130

Enter information about scheduling your unit section occurrences. Use the Form Configurator window to assign responsibility to gain access to tabs.

Setting Up Instructors

Instructors are assigned to a unit section based on the unit section schedules maintained in Oracle Student System. You can now assign multiple instructors to a unit section based on their unit occurrence schedules. If a unit section occurrence is associated with multiple instructors, the data related to all multiple instructors is passed on to the scheduling interface tables.

Setting Up Preferred Region

If you enter values in the Preferred Region of the window, then you cannot enter data in Scheduled Building/Room, Dedicated Building/Room, and Preferred Building/Room tabs.

Setting Up Scheduled Building

Buildings and rooms are associated with a unit section along with various other attributes within a unit section such as different locations, dates, and time. Buildings and rooms are scheduled based on unit section schedules.

Note: If Scheduled building and room are entered, you will not be able to enter any other building and room information such as the preferred or dedicated building and room.

Setting Up Dedicated Building / Room

Enter the dedicated building and room.

Note: You can only either enter Dedicated building and room or Preferred building and room, but not both.

If you have already entered values for the scheduled building and room, then the you will not be able to enter information in this tab.

Setting Up Preferred Building / Room

Several other buildings are associated with a unit section along with various attributes within a unit section, based on different locations, dates, and time.

The other building options procedure enables you to schedule dedicated and preferred buildings to a unit section occurrence.

Setting Up Facilities

In this tab, the Unit Facilities section displays the data set up at the unit level. If you enter the values at the Overrides section, then Oracle Student System removes the inherited relationships between unit and unit section.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Occurrences > Unit Section Occurrences > Scheduling Details > Scheduling Details

12.14 Unit Section Teaching Responsibility

Set up unit section teaching responsibility.

12.14.1 Unit Section Teaching Responsibility IGSPS116

Multiple instructors can be assigned at the unit section occurrence level. You can assign the lead instructor, the teaching load, and the percentage.

Prerequisites

Unit section occurrences are set up.

Navigation

Unit Section > Unit Section Details > Teaching Responsibilities > Unit Section Teaching Responsibilities

Additional Notes and Business Rules

Percentage: In the Teaching Responsibilities tab, the load percentage of a unit section must add up to 100%.

Lead Instructor: There can be only one lead instructor for a unit section.

12.15 Enrollment Deadlines

Set up enrollment deadlines.

12.15.1 Setting Up Enrollment Deadline Calculations IGSPS101

Set up, calculate, and modify the discontinuation deadline dates for a unit section. Using offset constraints is optional.

You can also calculate discontinuation deadline dates for the administrative unit status with unit status **Discontin**. The cutoff dates specified in the Enrollment Category Configuration window apply unless an override date is specified at the unit section level.

The override value can either be calculated using the method described here or can be manually entered. You can override these existing deadline dates and these dates take priority over the date aliases entered in the Enrollment Calendar Configuration window.

Using offset constraints you can calculate the new deadline while taking into account a variety of factors. For example, you can specify that the date determined does not fall on a Sunday.

Prerequisites

Basic unit details are set up.

Unit offerings are set up.

Unit sections are set up.

Navigation

Program Structure and Planning- Unit Section > Unit Section Details > Enrollment Deadlines > Enrollment Deadline Calculations

Additional Notes and Business Rules

Definition Level: Define the formula either for an institution or organizational unit.

Organizational Unit: You must select Organizational Unit, if organizational unit is selected in Definition Level field. A value is displayed only if definition level is equal to organizational unit. If defined at the institution level, a value cannot be defined for each individual organization, so the organizations are not available.

Formula Method: The formula method is the duration days or meeting days. The formula method determines the type of calculation performed on the Unit Section Details window for non-standard unit sections.

Round Method: Select either Standard Round to round to the nearest number or Always Round Up.

Call Number: A unique identifier that represents a unit section in a term.

Calendar Type: A user-defined name given to all calendars of a similar classification.

Alternate Code: Identifies the calendar type to simplify data entry.

Calculate: Calculates the deadline date. Click this button if offset constraint is set.

Deadline Date: Displays the day after which the student cannot discontinue.

12.16 Unit Subtitle

Set up unit subtitles.

12.16.1 Setting Up Unit Subtitles IGSPS109

Define the possible subtitles for a unit.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Unit > Unit Subtitle

Additional Notes and Business Rules

Approved: If selected, then subtitle is approved by an institution or organizational unit.

12.17 Program Annual Loads

Program annual load is the standard annual load for each year of a program.

12.17.1 Setting Up Program Annual Load IGSPS025

Annual load can be variable or standard. If the standard annual load is constant, it can be entered as a single value in the Basic Program Details window.

If you have a variable annual credit point load for a full-time year of study, an Full Time Equivalency calculation derives a student's attendance type based on setup.

For example, if the annual credit point load for a full-time year of study varies between years within a program, annual credit point values must be entered for each year of the program version. This is illustrated as follows:

- **year1:** 96 credit points

- **year2:** 108 credit points
- **year3:** 96 credit points

Unit versions can be linked to program annual loads for the purpose of calculating their Effective Full-Time Student Units. In particular, a unit version can be linked to the load for a particular year of a program.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Basic Program Details > Other Program Detail > Program Annual Load > Program Annual Load

12.18 Unit Sets

Unit sets define a path of study, ensuring the satisfactory progression and completion of student program attempts.

Unit Set Functions

The following table describes how unit sets are used in various subsystems.

Table 12–7 Unit Set Functions

Subsystem	Unit Set Function
Program Structure and Planning	Enables creation and maintenance of unit sets and mapping of unit sets to entry point reference codes for Admissions uploads
Admissions	Enables selection of unit set as part of an admission application. If an offer of admission is made, details regarding this unit set form part of the admission offer.
Enrollment	Unit sets can be included as part of student’s program attempt
Graduation	Enables ordering of graduation ceremonies, grouping graduands by unit set as well as program
Student Finance	Unit sets can trigger fee calculations for students enrolled in unit set

Academic and Administrative Unit Sets

Academic unit sets further define the path of study a student has selected, such as a major in Accounting or a specialization in Taxation.

Administrative unit sets restrict the paths a student can follow within a program. For example, a Bachelor of Business program can have the following user-defined administrative unit set streams:

- Stream 1: Accounting, Banking and Finance, and Economics majors
- Stream 2: Management, Marketing, and Communications majors

A student enrolled in the Bachelor of Business program who elects to complete an Accounting major is restricted to unit sets in Stream 1. The student cannot pursue unit sets in Stream 2 except in special circumstances.

Administrative unit sets also include subjects that all students are required to complete. For example, a core unit set can consist of an English unit and a Physical Education unit to be completed by all students as part of their program, regardless of field.

Administrative unit sets also define progression components of a program.

UK Note: Administrative unit sets with categories of enrollment year are used to represent the year of program.

Note: By default, administrative unit sets are not displayed on documentation such as transcripts and diplomas, except for the UK year of program unit sets.

Note: In special circumstances, your institutional policy can allow students to select unit set majors or minors from Stream 2. The Authorized By fields must be filled in under these circumstances.

Unit Sets and Encumbrances

The *Excluded from Enrollment in a Specific Program Unit Set* effect type, one of the system encumbrance effect types available to institutions, can prevent a student within a particular program from selecting a specific unit set.

For information on applying encumbrances to individual students, see Chapter 6, "System Wide Services: Person".

12.18.1 Setting Up Unit Set Categories IGSPS063

Enter user-defined unit set categories to define the grouping of unit sets. For example, **Core**, **Major**, **Minor**, **Dbl-Major** can be set up.

Navigation

Program Structure and Planning > Unit Set > Unit Set Categories

Additional Notes and Business Rules

Deletion: After being used, unit set categories cannot be deleted, and can only be modified slightly.

Rank: After being used, the unit set rank cannot be modified. Each code must have a rank assigned. The unit set category rank defaults to 1 and can be altered. The unit set rank is primarily used to define the sequence in which unit sets are displayed; for example, transcripts of results. The rank also determines whether a unit set can be a primary set within the Student Unit Set Attempt History window.

Unit Set Category: The unit set category can be altered only if the unit set status is Planned.

Unit Set Status: A unit set status cannot be reset to Planned after it is changed to Active or Inactive.

12.18.2 Setting Up Unit Set Statuses IGSPS064

Map user-defined unit set statuses to system unit set statuses to be used in the Basic Unit Set Details window. Unit set statuses indicate if unit sets are active, inactive, or planned.

Navigation

Program Structure and Planning > Unit Set > Unit Set Statuses

12.18.3 Setting Up Basic Unit Set Details IGSPS065

Unit sets define a student's nominated path of study and to assist in the assessment of progression and completion of the student's program attempt. A unit set can be defined as academic or administrative.

- Academic unit sets do not have the Administrative check box selected. Academic unit sets are those that further define a student's path of study, for example, Majors and Minors.
- Administrative unit sets are used to define progression components of a program or to restrict the set of academic unit sets that a student can pursue.

A unit set has the following four date fields:

- The Start Date field value is inserted by the system when it creates the unit set.

- The Review Date field is used as an indication of when a unit set must be reviewed and updated.
- Setting the Expiration Date field prevents further selections of a unit set while keeping the unit set active for current students. Unit sets that have an expiry date set, display a label when selected on all relevant pages.
- Setting the End Date field prevents further use or alteration of the unit set.

Unit sets can be restricted to selected program types. Selecting a program type from the List of values restricts the unit set to the selected program type or types. If no program types have been selected, the unit set is available for all program types.

Prerequisites

Basic unit details are set up.

Program statuses are set up.

Unit set categories are set up.

Unit set statuses are set up.

Program offering notes are set up.

Program types are set up.

Navigation

Program Structure and Planning > Basic Unit Set Details

Additional Notes and Business Rules

Unit sets: After being used, unit sets cannot be deleted.

Expiration Date: Only one version of a unit set can have an unspecified expiration date.

End dates: When you set an end date, the unit set status must be changed to Inactive in the same transaction. Similarly, when setting a unit set status to Inactive, an end date must also be entered in the same transaction. The combination of end date and unit set status Inactive cannot be set if there are active students within an offering of the unit set. The details of a unit set version cannot be altered if the unit set status is Inactive. To make changes, reset the unit set status to Active, delete the end date, and save before performing changes.

Mapping: Oracle recommends that all unit sets be mapped to an academic organizational unit.

Administrative: If selected, then unit set can direct a student's path of study but cannot constitute the major studied.

Authorization Required: If selected, then students who select the unit set be approved.

Field of Study: Field of study cannot be duplicated for the same unit set.

12.18.4 Setting Up Unit Set Rules IGSPS068

Unit set rules validate and govern enrollment activity.

Available unit set rules are **Unit Set Prerequisite** and **Unit Set Completion**.

You must enter each unit that you want to be included in the unit set rule. If you want to require a unit for a unit set, you must include it in the rule definition.

Navigation

Program Structure and Planning > Unit Set > Unit Set Rules

Additional Notes and Business Rules

Creating rules: Wild cards can be used in the unit set rules:

- ENGL1% will match with ENGL101, ENGL102

You can copy and paste between rules. You can find unit codes by entering part of the unit code and then clicking the Options/Validate button

12.18.5 Setting Up Unit Set Notes IGSPS067

Enter notes for unit sets.

Prerequisites

Program and unit note types are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Set Notes > Unit Set Notes

12.18.6 Applying Unit Sets to Program Offerings IGSPS066

You can apply unit sets to program offerings. This allows you to identify the unit sets that can be taken as part of the program. You can create a unit set and apply it to several different programs.

Prerequisites

Program types are set up.

Basic program details are set up.

Navigation

Program Structure and Planning > Basic Unit Set Details > Apply Unit Set to Program Offerings > Apply Unit Set to Program Offerings

Additional Notes and Business Rules

Apply to All Offerings: Click this button to apply unit set to all program offerings.

Apply to Highlighted Offerings: Click this button to apply unit set to highlighted program offerings only.

12.18.7 Setting Up Program Offering Unit Sets IGSPS020

Map unit sets to individual program offerings to set up different unit sets for the program offering.

Queries can be performed in the Program Offering region only when the Program Offering Unit Sets window is accessed through the Program Structure and Planning menu. Queries cannot be performed on Program Offering when you navigate to the Program Offering Unit Sets window using navigation buttons.

To select a new program offering, you must exit the Program Offering Unit Sets window and return to the Program Offerings window or the Apply Unit Set to Program Offerings window.

The program type details displayed in the Apply Unit Set to Program Offerings window reflect the position of the cursor in the Basic Unit Set Details window. When the cursor there is located in the Unit Set region, all programs for the program type restrictions applied are displayed in this window. When the cursor is located on a program type restriction, then only the programs for the selected program type restriction are displayed in this window.

The following information applies to this procedure:

- Unit sets can be applied to program offerings and queries can be performed on the unit sets previously attached.
- Queries can be performed on program offering unit sets. When performing queries, the Include Expired Unit Sets and the Include Inactive Unit Sets check boxes can be selected.
- The Include Inactive Unit Sets check box cannot be selected without selecting the Include Expired Unit Sets check box.
- Only Active and Planned unit sets can be attached to program offerings.
- Unit sets can be attached only to programs that do not breach the unit sets' program type restrictions. These are maintained in the Basic Unit Set Details window.
- If the Administrative check box is selected in the Basic Unit Set Details window, the Show on Official Notification check box in the Program Offering Unit Sets window is deselected.

Prerequisites

Basic unit set details are set up.

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets

Additional Notes and Business Rules

Unit set codes: Only **Planned** or **Active** unit sets are displayed.

Override Title field: The override title displays a title that reflects the unit set and program offering relationship. For example, a unit set containing accounting units is applied to an engineering program. The override title is Engineering Accounting.

Only as Subordinate: If selected, the unit set is restricted from being placed as superior in unit set relationships. If a unit is marked as Only as Subordinate, a unit set must be created in the Program Offering Unit Set Relationships window. The Only as Subordinate check box cannot be selected if the unit set exists as a superior in a unit set relationship. The Only as Subordinate check box cannot be altered if the unit set is mapped to a program offering option admission category.

Show on Official Notification: If selected, then unit set details on official notices such as transcripts are displayed.

12.18.8 Setting Up Program Offering Unit Set Relationships IGSPS021

Create the hierarchical relationship structure that can exist between unit sets within a program offering. Create relationships between unit sets to assist in defining the path of study and progression of a student's program attempts.

Prerequisites

Basic program details are set up.

Basic unit set details are set up.

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets

Additional Notes and Business Rules

Only as Subordinate: If a unit set has the **Only as Subordinate** check box selected in the Program Offering Unit Sets window, only superior relationships can be created against the unit set.

Superior Unit Set: The list of values for this field is restricted to those unit sets that are applied to the program offering.

Subordinate Unit Set: The list of values for this field is restricted to those unit sets that are applied to the program offering.

12.18.9 Setting Up Program Offering Option Unit Sets IGSPS022

Apply unit sets to program offering options. Typically, the Program Offering Option Unit Sets procedure deletes one or more preexisting unit sets, established in the Program Offering Unit Sets window, that are not available within a particular program offering option. If the unit set is not available for the program offering option, you have the ability to remove it. If there are only a few program offering options that are different, then you do not have to enter the unit set repeatedly for all program offering options.

Queries can be performed in the Program Offering Option region only when the Program Offering Option Unit Sets window is accessed through the menu. When the Program Offering Option Unit Sets window is opened using a navigation Button, queries cannot be performed in the Program Offering Option region. To select a different program offering, exit the Program Offering Option Unit Sets window and return to the Program Offering Options window or the Program Offering Unit Sets window.

Prerequisites

Program attendance modes are set up.

Attendance type are set up.

Organizational units are set up.

Basic unit set details are set up.

Navigation

Program Structure and Planning > Program Offerings > Program Offering Unit Sets

Additional Notes and Business Rules

Include inactive unit sets: **Include Inactive Unit Sets** check box cannot be selected without selecting the **Include Expired Unit Sets** check box.

Queries: Queries can be performed on unit sets within a program offering option.

Displaying inactive unit sets: To display inactive unit sets and unit sets that are unavailable for enrollment, select the Include Expired Unit Sets check box or the Include Inactive Unit Sets check box.

Unit Set Code field: The list of values in this field are restricted to those applied to the program offering in the Program Offering Unit Sets window.

12.18.10 Setting Up Program Offering Option Unit Set HESA Details IGSHE012

Program offering option unit set related data required for reporting to HESA and not captured in Oracle Student System is manually entered in the HESA details window.

The data must be recorded to ensure that any students enrolled on the program offering option unit set are included in the HESA individualized student returns generated. The program offering option unit set details are only captured for HESA year of program records (unit sets with type **Pre-enroll Year**).

Prerequisites

Basic program details are set up.

Basic unit set details are set up.

Units sets have been associated with the program offering option.

IGS: Country Code option is set to **United Kingdom**.

Year of Program functionality is enabled by setting IGS: Career Model Enabled profile option to **No**.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offerings > Program Offering Options > Program Offering Options > Program Offering Option HESA Details > Program Offering Option Unit Set HESA Details

Additional Notes and Business Rules

UFI Place: This field indicates if the year of program has University for Industry designated funding and is used to derive the **UFIPLACE** field, combined return field 164, student return field 149.

Teaching Period Start Date: This field identifies the start of the year of program teaching period.

Teaching Period End Date: This field identifies the end of the year of program teaching period.

Fundability Code: This field indicates if student fundable by Funding Council and is used to derive the HESA **FUNDCODE**, field 65 of the student and combined returns. A value should be selected from the user defined fundability codes if the program fundability code does not apply to the year of program.

Major Source of Funding: Select a major source of funding from user-defined funding sources. This overrides HESA major source of funding value derived from the program funding source restriction.

Franchising Activity: Select a value from the list of user defined franchising activity codes when the year of program franchising activity has not been recorded for the program, or differs from that recorded for the program.

Fee Band: Select a value from the list of user defined fee band codes when the fee band has not been recorded for the program or the program fee band does not apply to all years of the program.

Level Applicable to Funding Council HESES: English and Northern Irish institutions should select a level applicable to funding council HESES from the list of user-defined values if the value specified for the program does not apply to the year of program.

Location of Study Code: Select a location of study code if the value specified for the program does not apply to the particular year of program.

Other Institutions Providing Teaching, 1 and 2, and Proportion not Taught by Institution: These fields only need to be completed if the **Use Program for Calculation** check box is selected. Select the other institutions providing teaching 1 and 2 from the list of values and enter the proportion where the values for the year of program differ from the values for the program.

Cost Centre: On this tab, you can record HESA cost centre, subject area, and proportion at the year of program level to over-ride the values captured for the program. The sum of the proportions must equal 100. The **Use Program for Calculation** check box must be selected for the year of program cost centre and subject apportioning to be used when deriving fields 100 to 147 of the combined return.

FTE calculation process: The FTE calculation process assumes that an intensity based calculation is to be performed for all full time and research programs and a unit based calculation is to be performed for all part-time programs. Select the FTE calculation type to change the FTE calculation method for a year of program. If an intensity based calculation is being performed the intensity of a program is assumed to be 100, unless specified at the program level. Enter the FTE intensity for any year of program where the FTE is not the default 100% or the FTE for the year is different to that for the program.

Mode of Study: Select the mode of study from the list of user-defined values to override the mode of study derived from the program offering option attendance type.

Type of Year of Program: This is used to derive the HESA **TYPEYR** field, field 153 of the combined return, field 138 of the student return. Select a value for each year of program unless either a constant value has been specified for the field or the user return field value holds for the year of program.

Length of Current Year of Program: This field is used to derive the **YEARLGTH** field, field 73 of the student and combined returns for Welsh and Scottish institutions. Enter the normal number of weeks (excluding holidays and placements) from the commencement of study, the first teaching week, to the completion within the current year of the program.

Credit Value of Year of Program 1 and 2: These fields are used to derive the HESA **CREDIT1** and **CREDIT 2**, fields 92 and 93 of the combined return. A value should be entered if a constant has not been specified for these fields within the return definition or the user return field default does not apply to the year of program. These fields are not used in the generation of a student return.

Level of Credit 1 and 2: These fields are used to derive the **LEVLCRD 1** and **LEVLCRD2**, fields 94 and 95 of the combined return. Select a value from the user

defined list if a constant has not been specified for these fields within the return definition or the user return field default does not apply to the year of program. These fields are not used in the generation of a student return.

Grading schema: Select the grading schema if you plan to capture a mark and grade for the year or program, rather than use the summary measures functionality to derive the level mark and grade based on the unit attempt marks.

Organizational Unit: On this tab, you can select the organizational units who contribute to the teaching of this year of program and enter the proportion. The sum of the proportions must equal 100. The organization units that can be selected can be filtered according to the organizational unit X and X. The organizational unit apportionment is not used directly in the HESA return derivation process. For more information, see Chapter 8, "System Wide Services: Organizational Structure".

12.18.11 Relate Unit Sets to Program IGSPS013

Relate unit sets to programs.

12.19 Pattern of Study

A pattern of study defines the pre-determined structure which students enrolled in a program follow. Oracle Student System uses the pattern of study to pre-enroll students.

When pre-enrollment is run against the student, Oracle Student System can determine which unit attempts are core and which are optional, based on the set up in the pattern of study for the unit or unit section. If the unit is identified in the pattern of study, then all attempts in any section of that unit are marked as core. If only the unit section is identified in the pattern of study, then all attempts associated with that unit and all its sections are marked as core.

12.19.1 Setting Up Program Offering Patterns IGSPS037

An offering pattern enhances the definition of a program offering instance through the assignment of further attributes to the program offering option. These attributes are primarily concerned with the availability of the program offering instance. A program offering instance can have more than one offering pattern.

Prerequisites

Program attendance modes are set up.

Attendance type are set up.

Locations are set up.

Navigation

Program Structure and Planning > Basic Program Details

Additional Notes and Business Rules

Closed: Program offering patterns cannot be added if any component of the program offering option is closed, especially attendance mode and attendance type. Program offering patterns cannot be added if the calendar type in the program offering is closed.

Program Offering Instance Statuses: Program offering patterns cannot be added if the calendar instance in the program offering instance is not **Active**. Program offering patterns cannot be added, modified, or deleted if a program version is **Inactive**.

Changes: Location Code, Attendance Mode, and Attendance Type fields are protected against modification. Incorrectly entered data can be deleted provided that the incorrect entry does not have any children records entered against it, and the correct data can be selected in a new record.

Offered: If selected, then the program offering option is available for offer to students.

Confirmed Offering: If selected, then the program offering is rolled over from a previous version of its calendar.

Entry Point: If selected, then offering pattern is available as an entry point through admissions and a student can be admitted to the program offering pattern through admissions.

Pre-enroll Units: If selected, then units are available for enrollment are included in the enrollment and pre-enrollment functions for this program offering option.

Enrollable: If selected, then program offering option is a currently valid enrollment option for students.

Minimum field for Entry Assessment Scores: Enter the entry assessment score that is the minimum Required for entry to the program offering pattern in this field. This entry overrides a value entered against the program offering instance.

Guaranteed field for Entry Assessment Scores: Enter the entry assessment score that is the minimum Required to guarantee an offer of a position. This entry overrides a value entered against the program offering instance.

Grading Schema Code field: Only current or future-dated grading schema can be selected for a program offering pattern. If entered, the program offering pattern grading schema has precedence over the unit offering option grading schema unless the Unit Grading Schema Precedence check box is selected in the Unit Sections window. If the program grading schema is used and has precedence over the unit grading schema, recommended grades are translated from the unit grading schema to the program schema. This procedure is performed using the Translate Student Unit Attempt Outcomes job.

12.19.2 Setting Up Program Offering Pattern Notes IGSPS038

Enter notes for program offering patterns.

Prerequisites

Program and unit note types are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offerings > Program Offering Patterns > Program Offering Patterns > Program Offering Notes > Program Offering Notes

12.19.3 Setting Up Patterns of Study IGSPS034

A pattern of study can be specified to apply to one or more academic periods in advance. This permits a student's pre-enrollment to be performed for either the upcoming academic year or any number of academic years. For example, by specifying a value for number of periods of 1, pre-enrollment takes place only one year in advance. For each academic year covered by the pattern of study, the teaching periods in which pre-enrollment take place are specified in the Pattern of Study Period window and the units to be pre-enrolled in the teaching periods are also entered in the Pattern of Study Period window.

For example, students studying on campus can be offered a different pattern of units from those studying off campus. Full-time on-campus students might typically take X units spread over Y teaching periods, whereas part-time on-campus and off-campus students might take the same X units over 2Y teaching periods. This is reflected in different patterns of study, and therefore different sets of units being pre-enrolled.

Students taking different majors have different unit requirements or unit sets to satisfy their major. The unit requirements can be specified as a pattern of study.

Admission calendar is used to limit the pattern of study to a particular admission period. This can apply if incoming midyear students are offered a different pattern of units from that offered earlier incoming students.

Beginning of year and midyear incoming students have the same units in their patterns of study, but the pattern is different because one starts in SEM-1 and the other in SEM-2.

The Location Code, Attendance Mode, Attendance Type, Admission Calendar, Unit Set Code, and Admission Category fields are optional fields that restrict the applicability of a particular pattern of study. If any of these attributes are specified for a pattern of study, then a value must be specified for that attribute in all other patterns of study for the program offering unless it is a default pattern of study. For example, if a location is specified for a pattern of study, then all other nondefault patterns of study must also have location specified.

Not all programs lend themselves to the use of patterns of study. Programs with no or few prescribed units are in this category. Some programs have a group of compulsory or core units with the rest of the program made up of optional and elective units. In these cases, the choice can be to include only the prescribed units in the pattern of study. Optional and elective units can be listed as unspecified units.

Prerequisites

Program attendance modes are set up.

Attendance types are set up.

Locations are set up.

Basic unit set details are set up.

Admission categories are set up.

Admission period calendars are set up.

Navigation

Program Structure and Planning > Program Offerings > Pattern of Study

Additional Notes and Business Rules

UK Modifications: The **Academic Period within Unit Set** check box is added. If selected, then pattern of study academic period falls within unit set. If deselected, indicates academic period falls within student enrollment.

Number of Periods: This field is the number of academic periods students are pre-enrolled each time pre-enrollment process is run. For example, specifying 2 means units are pre-enrolled in both the upcoming academic year and the following academic year, unless the upcoming period is the final period of the student's program.

Always Pre Enroll: If selected, then pre-enrollment of units is enabled. If deselected, pre-enrollment occurs only if students enrolled in and passed previous academic period units.

Academic Period within Unit Set: If selected, then pre-enrollment process to pick up the next unit set in the academic period is enabled.

Copy Pattern of Study Detail: This button opens a window to enable the details of one pattern of study to be copied to a new pattern of study.

Pattern of Study Period: This button opens Pattern of Study Period window to define units to be pre-enrolled for each teaching period.

Academic Period within Unit Set: If selected, then pattern of study academic period falls within unit set. If deselected, then academic period falls within student enrollment.

12.19.4 Setting Up Program Pattern of Studies IGSPS035

A program pattern of study further defines the structure of study by teaching period.

Each pattern of study entered in the Patterns of Study window must have details entered in the Program Pattern of Studies window. These details include the following:

- Against each pattern of study, the teaching periods within the academic periods in which the pattern's units are to be pre-enrolled
- Against each teaching period, the units to be pre-enrolled for that teaching period or the unspecified units, such as Optional units and electives, for the teaching period

Academic period numbers are the number of the academic years in which teaching periods are related to this pattern of study. Each academic period number corresponds to an academic year in which a student is expected to enroll when progressing normally. The following examples show how academic period numbers can be used:

- **Example 1:** A full-time three-year degree commencing midyear involves teaching periods in academic years 1, 2, 3, and 4. If two or more teaching periods related to the pattern of study, such as semester 1 and semester 2, occur in the same year, then two or more records with the same academic period number must be created.
- **Example 2:** A full-time three-year degree with incoming students at the start of the year involves teaching periods in academic years 1, 2, and 3 only.

Example 1

A number of patterns of study are set up for a three-year full-time program in the Patterns of Study window. One of these has the number of periods set to 1 and the admission calendar set to ADM-PER-2, admission period 2, which is the admission period for the mid-year incoming student. The latest approved academic calendar instance is entered as the academic year 2004. No other attributes are set, meaning that this pattern of study applies to all offerings of the program in ADM-PER-2. With this pattern of study selected, **Pattern of Study Period** is clicked to navigate to the Program Pattern of Studies window.

Each of the teaching periods for the typical duration of the program is entered against the number of the academic period in which it falls. In this case, the pattern starts with midyear, so against academic period 1 is entered teaching period SEM-2, semester 2. Against academic period 2 is entered both SEM-1 and in the next record SEM-2. This continues until the last record, academic period 4, SEM-1, is entered. When this pattern of study is used for students admitted to the program in the 2004 instance of ADM-PER-2, the pattern of study applies.

For each pattern of study period record, the units to be pre-enrolled in the pattern of study period are entered. These units are generally core or mandatory units, but for unspecified units, such as Optional units and electives, the description can be entered. For example, by entering units against academic period 2, SEM-2 in the previous example, when pre-enrollment is performed for the year 2005, students continuing in the program are pre-enrolled in the units.

If the program in this example also has a part-time offering and the institution performs pre-enrollment for part-time programs, then pattern of study periods must be set up for more than four academic periods and the units applicable to each period entered against them. This can be of use only if there is a prescribed pattern of study for the part-time program.

Example 2

A program commencing at the start of an academic year includes year-long units and straddle units, which are units commencing in semester 2 and finishing in semester 1 of the following year. The creation of patterns of study for this program uses the same method as for Example 1.

The patterns of study in this case differ in that the year-long and straddle teaching periods must be entered for each academic period number with units offered in these teaching periods.

Pre-enrollment does not occur for unspecified units, but they can be listed on enrollment forms or included in correspondence sent to students.

Prerequisites

Unit categories are set up.

Unit section details are set up.

Calendar relationships are set up.

Navigation

Program Structure and Planning > Program Offerings > Pattern of Study > Pattern of Study Period > Program Pattern of Studies

Additional Notes and Business Rules

Location Code: In this field, if location is specified, it is used by the pre-enrollment process. Matching unit offering options must exist and become the unit offering option in which to pre-enroll students. If not specified, the pre-enrollment process uses an algorithm to determine in which, if any, unit offering option to enroll students.

Unit Class: If class is specified, it is used by the pre-enrollment procedure, if matching unit offering options exist, to select the unit offering option in which to pre-enroll students. If not specified, the pre-enrollment procedure uses an algorithm to determine in which, if any, unit offering option to enroll students.

Active version: The units must have a least one Active version. Validation messages advise if there are no unit offering options of a unit in future pattern of study details with matching location or class.

Repeatable: A unit is not typically entered against more than one pattern of study period unless its Repeatable check box is selected.

Description: For each pattern of study period record, a unit code or description must be inserted, but not both. The Description field is typically used to enter unspecified units such as options and electives.

Mandatory fields: When you enter the unit code for the pattern of study units, if the unit code is marked as a placement unit, then Location and Unit Class fields are mandatory. If any unit sections that have a relationship type Superior or Subordinate, then Location and Unit Class fields are mandatory.

12.20 Program Offering Option

Program offering options further define program offerings by describing information such as when the program offering is offered.

The following must be set up to define program offering options:

- Program offering
- System reference code type
- Government attendance type
- Government attendance mode
- Location
- Reference code type
- Attendance type
- Attendance mode

Locations are set up in the Organizational Structure subsystem.

12.20.1 Setting Up Program Offering Options IGSPS032

Define the manner in which a program is studied by specifying the attendance mode, for example, On Campus, Off Campus, Web Based Learning, or Distance Learning, and the attendance type, for example, Full Time, Half Time, or Quarter Time. A program offering can have more than one offering option.

You can mark program offering options for deletion. Closed program offering options will not show up in the lists of values in any window.

Prerequisites

Program attendance modes are set up.

Attendance types are set up.

Locations are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offerings > Program Offering Options > Program Offering Options

Non-modal window: The Program Offering Option window is non-modal. That means that you do not have to close the window in order to go back to Basic Program Details. For example, when you query B.Art in Basic Program Details, in the Program Offering Option window, the program B.Art will be defaulted in. However, if you return to Basic Program Details and re-query another program B.HST, and open up Program Offering Option window, then there will be 2 program offering option windows opened; 1 with the B.Art in context and 1 with B.HST in context.

Additional Notes and Business Rules

Manual entry: The program length and unit of length fields have been moved from the program level to the program offering option level. You must manually enter the program length and unit of length fields for all existing programs.

Forced Location: If selected, then selected location is the only one where units of the program offering can be taken.

Forced Attendance Mode: If selected, then selected attendance mode is the only one in which units of the program offering can be taken.

Forced Attendance Type: If selected, then selected attendance type is the only one for the program offering.

UK institutions: The **Program Length** and **Program Length Measurement** fields are used to derive the expected length of study programme (**SLENGTH**, field 49) and units of length (**UNITLGTH**, field 50) fields of the combined and student returns.

12.20.2 Setting Up Program Entry Point Reference Codes IGSPS033

Each program offering option is uniquely identified by a program code, version number, calendar type, location code, attendance mode, and attendance type. Enter codes used by other systems or organizations to identify a program offering option, such as VTAC. Map these user-defined reference code types to system reference code types.

Program entry point reference codes are defined by specifying the reference code type of the entry point reference code and a unique reference code. Unit set can also be attached to entry points. Whenever a new program offering option is created, the mandatory reference types and the default reference code are created. These mandatory reference types cannot be deleted or updated. The reference codes can be modified if required.

Prerequisites

Reference code types are set up.

Basic unit set details are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offering Options > Program Entry Point Reference Codes > Program Entry Point Reference Codes

Additional Notes and Business Rules

Reference Code Type: If the reference code type is mapped to a system reference code type of Crsofstudy, an existing program code can be used as a reference code. In this case, the program code is validated and the description is automatically inserted. Reference codes that are not valid program codes can also be used.

Reference Code: If any component of a program offering option, that includes calendar type, location, attendance type, or mode is closed, a program entry point reference code cannot be entered against it. A program entry point reference code cannot be inserted, modified, or deleted against an Inactive program version. Only reference codes that are not being used in program version definitions can be changed or deleted. Reference codes are usually changed only to correct a data error. This field is display only if the restricted reference code value is checked at the Reference Code Type Setup window. You can enter reference code in this window if the restricted reference code value is not checked.

12.20.3 Setting Up Program Offering Option Notes IGSPS036

Enter notes for program offering options.

Prerequisites

Program and unit note types are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offerings > Program Offering Options > Program Offering Options > Program Offering Option Notes > Program Offering Option Notes

12.20.4 Setting Up Program Offering Option Admission Categories IGSPS030

Admission category restrictions can be applied to program offering options. The purpose is to limit the admission categories for which admission applications for particular program offerings can be placed. When an admission application is processed, one of the following occurs:

- The admission application is assigned the admission category of the session details because that admission category is one of those to which the program offering is restricted.
- The admission application is assigned the admission category of the session details because the program offering option is not restricted to any particular admission category.
- An error message advises that the admission application cannot be entered under the current admission category. In this case, the session details can be changed to permit processing of the application, or the application can be removed from processing for later resolution.

Select a default admission category in cases where it is required to automatically determine an admission category for a program offering option. For example, during the Government offer load procedure, each application is assigned the default admission category for its subject program offering option.

Set restrictions on admission categories to which applications for a program offering can be placed. After you have set restrictions, you can assign only one of the restricted admission categories to the application in the Session Details window. If you set no restrictions, an application is assigned the admission category of the session details.

You can set further restrictions on unit sets for admission categories to which applications for a program offering can be placed.

Prerequisites

Admission categories are set up.

Basic unit set details are set up.

Navigation

Program Structure and Planning > Basic Program Details > Program Offering > Program Offerings > Program Offering Options > Program Offering Options > Program Offering Option Admission Categories > Program Offering Option Admission Categories

12.21 Cross Listed and Meet With Unit Sections

Cross listed unit sections have similar subject matter are taught by the same instructor at the same location and time. Meet with unit sections have common features except for their meeting patterns.

12.21.1 Setting Up Cross-Listed Units Groups IGSPS112

Create cross-listed unit groups by placing units with the same subject matter (content, location, and owning organizational unit) in a group.

You can create cross-listing at unit and unit section level. Units in a cross-listed group are inherited by unit sections that you specify for inheritance in the Inheritance Parameters window. You can also manually create cross-listings at unit section level. A unit in the cross-listed group is selected as parent. Parent unit details are used for scheduling and teaching purposes.

Note: The Cross-Listed Units Groups window can also be accessed from Basic Unit Details window in query mode. After a unit or unit section is assigned to a cross-listed group, it cannot be placed into another group.

If the unit cross listed group is not inherited down to the unit section level, Enrollment will not recognize the units as cross listed. You must indicate the teaching period for which the group is created.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Unit > Cross-Listed Units Groups

Additional Notes and Business Rules

Unit: After a unit is included in a cross-listed group, it does not appear in the list of values for the next unit name.

Enrollment Maximum: This field is equivalent to the sum of all units' maximum enrollment number.

Parent: Only one unit can be a parent in a cross-listed group. After being selected for a unit, all other check boxes are disabled.

12.21.2 Setting Up Unit Section Cross-Listed Groups IGSPS113

Query, define, and maintain the cross-listing of unit sections.

Prerequisites

Calendar types are set up.

Basic unit section details are set up.

Navigation

Program Structure and Planning > Meet With / Cross Listed Group> Cross-Listed Unit Sections Group

Additional Notes and Business Rules

Location Inheritance: If selected, then children are allocated to the same location as the parent. If deselected, then children are allocated a different location.

Parent: Only one parent can be selected for each cross listed unit section group. A parent unit section cannot be deleted unless some other unit section is made the parent.

12.21.3 Setting Up Unit Section Meet with Classes Group IGSPS110

Select the unit section to be scheduled for each meet with classes groups.

Prerequisites

Unit section details are set up.

Navigation

Program Structure and Planning > Meet With / Cross Listed Group > Meet With Classes Group

Additional Notes and Business Rules

Display: To display the fields in the Meet With Unit Section region with a query, select the **Meet With Unit Section** check box.

Calendar Type: Depending on the calendar type selected, the Alternate Code and Effective Dates are automatically populated.

Host: Only a single host can be assigned for each meet with class group. A unit section selected as the host cannot be deleted unless an alternate unit section is made the host.

12.21.4 Setting Up Meet with Exams Group IGSPS111

Create meet with exams group. A meet with exams group is unit sections that are not related grouped together for exam purposes only. This can be used to maximize your space by putting two small classes together in a large examination hall.

A unit section is identified as the host within each meet with exam group. The host's information is used for the meet with exams group. All other unit sections within the meet with exams group are considered as guests and will share the host's information.

For example, the building and room of the host is used for scheduling. Therefore, the guests will also have the same building and room as the host for the exam.

Prerequisites

Calendar types are set up.

Basic unit details are set up.

Navigation

Program Structure and Planning > Meet With/Cross-Listed Group > Meet With Exams Group

Additional Notes and Business Rules

Query: You can only query the fields if this window is accessed from the Unit Section Assessments window.

Unit Section Assessments: Each unit section can only be applied to one exam group meeting.

Host: To appoint a unit section as a host, select the **Host** check box. Only a single host is assigned for each meet with exams group. A unit section selected as the host cannot be deleted unless some other unit sections is made the host.

12.22 Rules

Enter rules to validate enrollment.

Helpful hints: Wild cards can be used in the unit set rules:

- ENGL1% will match with ENGL101, ENGL102

You can copy and paste between rules

You can find unit codes by entering part of the unit code and then clicking the **Options/Validate** button.

12.22.1 Program Version Rules

The program version rules determine whether the program requirements are satisfied and whether the program requirements for an honors level are met. They are also used to derive the Commencing Student Indicator for the Statistics windows. Program version rules are viewed in the Program Version Rules window.

Rules for program versions are unique to the program code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Oracle Student System.

The following table describes program version rule operators. They are used with all program version rule operators.

Table 12–8 Program Version Rule Operators

Operator	Definition	Example
()	Parenthesis, to force execution order	(Must pass 20 credit points AND Must complete special requirement of type First Aid) OR Must pass credit points for program with no more than 4 credit points of pass conceded is not the same as Must pass 20 credit points AND (Must complete special requirement of type First Aid OR Must pass credit points for program with no more than 4 credit points of pass conceded)
{}	Start and end of definition	Set of Articulated Programs {A300, A313, A316}

Table 12–8 (Cont.) Program Version Rule Operators

Operator	Definition	Example
,	Separator between program or unit codes	Threshold of 12 must have units {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}
.	Separator between program or unit code and version number, or between grading schema code and grade	Set of Articulated Programs {A300, A313, A316.2} Result: Only considers program A316, version 2
[]	Start and end of version number set	Set of Articulated Programs {A300, A313, A316.[1-3,5]} Result: Only considers program A316, versions 1 to 3 or version 5
-	Range of program or unit version numbers	Set of Articulated Programs {A300, A313, A316.[1-3,5]} Result: Only considers program A316, versions 1 to 3 or version 5
%	Used to select multiple codes	{A%} for all units that start with A
AND	Logical and	Must complete credit points for program with no more than 1 credit point of pass conceded AND Must complete 4 units in {ADH601, ADH602, ADH603, ADH604, ADH605}
OR	Logical or	Must complete 4 units in {ADH601, ADH602, ADH603, ADH604, ADH605} OR Must complete 4 units in {ABF101, ABF102, ABF103, ABF104, ABF105, ABF106}

The articulated programs rule is used to derive the Commencing Student Indicator. The articulated programs rule is defined at a higher program level. For example, if a student is admitted to a Master's honors program, or transfers there from a Master's pass program, the rule is defined at the Master's honors level and includes the Master's pass programs.

The following table describes articulated programs rule syntax.

Table 12–9 Articulated Programs Rule Syntax

Syntax	Definition	Example	Result
Set of Articulated Programs {}	Student admitted to or transferred to Master’s honors or Bachelor’s honors program and enrolled in institution or previous institution, in related Master’s or Bachelor’s pass program	Set of Articulated Programs {A300}	If defined for program A400, then student admitted to A400 who completes A300 or transfers from A300 is commencing

The following table describes articulated programs rule variables.

Table 12–10 Articulated Programs Rule Variables

Variable	Definition	Example	Result
Program Code	Program code	{A300, A4%, %314}	Includes program A300, all programs that start with A, and all programs that end in 314

The program version completion rule is used by the Progression functionality to identify students who complete all applicable program requirements and are eligible to graduate and receive the program award.

The following table describes program version completion rule syntax.

Table 12–11 Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must pass <numeric value> credit points	None	Student achieves or exceeds specified number of credit points for program stage	Must pass 24 credit points

Table 12–11 (Cont.) Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
None	At level <numeric value> with no more than <numeric value> credit points of pass conceded [from units owned or not owned by {Org Unit Code}]	Student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must pass 12 credit points at level 1 Must pass 12 credit points at level 1 with no more than 2 credit points of pass conceded
None	In {} with grade of at least <Grading Schema.Grade>	Student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C
None	Not in {}	Student achieves specified number of credit points from units other than those in braces; valid codes are entered in braces	Must pass 4 credit points not in {MAA214, MAA303}
None	With no more than <numeric value>	Student achieves or exceeds specified number of credit points for student program attempt; qualified by specified pass conceded grade	Must pass 24 credit points with no more than 4 credit points of pass conceded
None	Units in {} with grade of at least <Grading Schema.Code.Grade>	Student passes, or is granted advanced standing for, specified number of units in specified set; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 2 units in {ADH601, ADH602, ADH603, ADH604} Must pass 2 units in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C

Table 12–11 (Cont.) Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
None	Units not in {}	Student passes, or is granted advanced standing for, specified number of units other than those in list of unit codes; valid unit code or set of codes is entered in braces	Must pass 4 units not in {ADH601, ADH602, ADH603, ADH604}
None	Units with no more than <numeric value> units in {}	Student passes, or is granted advanced standing for, specified number of units, but with no more than the specified number of units from those in unit code list; valid unit code or set of codes is entered in braces	Must pass 5 units with no more than 2 units in {ADH601, ADH602, ADH603, ADH604}
Must pass all units in {}	None	Student passes, or is granted advanced standing for, all units; qualified with valid unit code or set of codes inside braces	Must pass all units in {ADH601, ADH602, ADH501}
Must pass credit points for program	None	Credit points for student program attempt must equal or exceed number of credit points required for program version; no additional qualifier required because number of credit points required for program version is retrieved from system	Must pass credit points for program
Must pass credit points for program with no more than <numeric value>	Credit points of pass conceded credit points in unit codes	For student program attempt, student must equal or exceed number of credit points required for program version with no more than specified number of credit points with pass conceded grade	Must pass credit points for program with no more than 3 credit points of pass conceded

Table 12–11 (Cont.) Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must complete special requirement of type <Special Requirement Code>	None	Student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requirement of type First Aid
Must complete stage of type <Program Stage Code>	None	Student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03
Must have program grade point average equal to or greater than <numeric value>	None	Student has grade point average (GPA) equal to or greater than the specified numeric value	Must have a GPA equal to or greater than 5
Must have program weighted average mark equal to or greater than <numeric value>	None	Student has program weighted average mark (WAM) equal to or greater than the specified numeric value	Must have a WAM equal to or greater than 80

Table 12–11 (Cont.) Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
Must have completed <numeric value>	None	Student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	None
None	Primary unit sets of category <Unit Set Category>	Tests if specified number of primary unit sets from selected category are complete	Must have completed 1 primary unit sets of category Major
None	Unit sets in {}	Tests if specified number of unit sets are complete; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}
None	Unit sets of category <Unit Set Category>	Tests if specified number of unit sets from selected category are complete; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor
Must not exceed <numeric value>	None	In this student program attempt, student must not exceed the specified numeric value of credit points or units, or the numeric value percent of credit points or unties, with conceded passes	None
None	% credit points with conceded passes	Tests if number of credit points gained for units with conceded passes exceeds specified percentage of student's total credit points for program attempt	Must not exceed 12% credit points with conceded passes

Table 12–11 (Cont.) Program Version Completion Rule Syntax

Syntax	Additional Detail	Definition	Example
None	% units with conceded passes	Tests if number of units with conceded passes exceeds specified percentage of student's total passed units for program attempt	Must not exceed 15% units with conceded passes
None	Credit points with conceded passes	Tests if number of credit points gained for units with conceded passes exceeds specified number for program attempt	Must not exceed 4 credit points with conceded passes
None	Units with conceded passes	Tests if number of units with conceded passes exceeds specified number for program attempt	Must not exceed credit points with conceded passes

The following table describes program version completion rule variables.

Table 12–12 Program Version Completion Rule Variables

Variable	Definition	Example
Numeric value	Number	Must complete 24 credit points
Unit Code	Currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	Currently defined grading schema code	With grade of at least Standard.C
Grade	Currently defined grade within grading schema	With grade of at least Standard.C
Special Requirement Code	Currently defined special requirement code	Must complete special requirement of type First Aid
Program Stage Code	Currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	Currently defined unit set category	Must have completed 1 primary unit sets of category Major

The honors level rule is used by the Progression and Graduation windows to identify students who achieve a specified program grade point average and who are eligible to receive a specified honors level.

The following table describes honors level rule syntax.

Table 12–13 Honors Level Rule Syntax

Syntax	Definition	Example	Result
IF Program GPA >= <numeric value> THEN <Honors Level Code>	Evaluates student's program grade point average	IF Program GPA >= 4 THEN D	If true, student is awarded specified honors level
ELSE	Allows addition of another statement to existing statement	IF Program GPA >= THEN D ELSE IF Program GPA >= 3.75 THEN H1	None

The following table describes honors level rule variables.

Table 12–14 Honors Level Rule Variables

Variable	Definition	Example
Numeric value	Number	IF Program GPA >= 3.5 THEN H1A
Honors Level Code	User-defined code representing honors level to be awarded	IF Program GPA >= 4 THEN D ELSE IF Program GPA >= 3.75 THEN H1

The core rule allows a preliminary progression rule to be created, and allows institutions to specify the units that must be achieved once a student satisfies the number of credit points indicated as the threshold.

The following table describes core rule syntax.

Table 12–15 Core Rule Syntax

Syntax	Definition	Example
Threshold of <numeric value> must have units {}	Student must satisfy all units defined in set once he or she achieves threshold number of credit points for program	Threshold of 12 must have unit {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}
)	None	None
(	None	None
OR	None	None

The following table describes core rule variables.

Table 12–16 Core Rule Variables

Variable	Definition	Example
Numeric value	Number	Threshold of 12 must have unit {AIF241, AIF242, AIH151, AIP107, ASB310, ASC101, ASC204, ASC370, ASL112, ASL204, ASL206}
Unit Code	Currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121

12.22.1.1 Setting Up Program Version Rules IGSPS039

Capture information about program version rules.

Navigation

Program Structure and Planning > Program > Program Version Rules

Additional Notes and Business Rules

Undefined: If there is no rule entered for a program version, Undefined is displayed adjacent to the rule description.

12.22.2 Program Stage Rules IGSPS026

The completion rule is used by the Progression windows to identify students who complete all applicable requirements for a program stage.

In evaluating the completion of a program stage, other stages that make up the total program are not considered. For example, a three stage program can require a student to achieve eight credit points for Stage 1, eight credit points for Stage 2, and ten credit points for Stage 3. The rule for Stage 2 is written to require a student to achieve 16 credit points.

Rules for program stages are unique to the program code, version number, and program stage. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The program stage rules determine whether the requirements for a stage of a program are met. Program stage rules are viewed in the Program Stages window.

The following table describes program stage completion rule syntax.

Table 12–17 Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
Must complete <numeric value> credit points	None	Student achieves or exceeds specified number of credit points for program stage	Must complete 8 credit points	Returns true if student has 8 or more credit points or advanced standing
None	At level <numeric value> with no more than <numeric value> credit points of pass conceded	Student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must complete 8 credit points at level 1 Must complete 8 credit points at level 1 with no more than 2 credit points of pass conceded	Second example returns true if student has 8 or more credit points at level 1 and maximum of two of 8 credit points achieved through special Pass Conceded grade

Table 12–17 (Cont.) Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
None	In {} with grade of at least <Grading Schema.Grade>	Student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must complete 3 credit points in {ADH601, ADH603, ADH604} Must complete 3 credit points in {ADH601, ADH603, ADH604} with grade of at least Standard. C	Second example returns true if student achieves 3 credit points from listed units, with at least a credit result
None	With no more than <numeric value>	Student achieves or exceeds specified number of credit points for student program attempt; qualified by specified pass conceded limit	Must complete 8 credit points with no more than 2 credit points of pass conceded	Returns true if student has 8 or more credit points, and maximum of 2 of 8 credit points achieved through Pass Conceded grade

Table 12–17 (Cont.) Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
Must complete <numeric value> units in {} with grade of at least <Grading Schema Code.Grade>	None	Student passes, or is granted advanced standing for, specified number of units; valid unit code or set of codes are entered in braces; qualified with minimum grade value selected from grading schema	Must complete 2 units in {ADH601, ADH602, ADH603, ADH604} Must complete 2 units in {ADH601, ADH602, ADH603, ADH604} with grade of at least Standard. C	Second example returns true if student completes 2 units, with at least a credit result
Must complete all units in {}	None	Student passes, or is granted advanced standing for, all units; qualified with valid unit code or set of codes inside braces	Must complete all units in {ADH601, ADH602, ADH501}	Returns true if student completes all listed units
Must complete special requirement of type <Special Requirement Code>	None	Student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requireme nt of type First Aid	Returns true if student has current First Aid certificate

Table 12–17 (Cont.) Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
Must complete stage of type <Program Stage Code>	None	Student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03	None
Must have completed <numeric value>	None	Student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	None	None
None	Primary unit sets of category <Unit Set Category>	Tests if specified number of primary unit sets from selected category are complete	Must have completed 1 primary unit sets of category Major	None

Table 12–17 (Cont.) Program Stage Completion Rule Syntax

Syntax	Additional Detail	Definition	Example	Result
None	Unit sets in {}	Tests if specified number of unit sets are complete; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}	None
None	Unit sets of category <Unit Set Category>	Tests if specified number of unit sets from selected category are complete; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor	None

The following table describes program stage rule operators.

Table 12–18 Program Stage Completion Rule Operators

Operator	Definition	Example
()	Parentheses, to force execution order	(1+3)/4 is not the same as 1+3/4
{}	Start and end of unit or unit set definition	{ACC-MAJ1, ACC-MIN2}
,	Separator between unit or unit set codes	{ACC-MAJ1, ACC-MIN2}
.	Separator between unit or unit set code and version number	{ACC-MAJ1.2, ACC-MIN2.3}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit version set	{MAA101.[1,3-10], MAA102.3}

Table 12–18 (Cont.) Program Stage Completion Rule Operators

Operator	Definition	Example
%	Used to select multiple units or other codes	{A%} for all units that start with A
AND	Logical and	(Must complete 3 credit points AND Must complete special requirement of type First Aid) OR Must complete 5 credit points
OR	Logical or	(Must complete 3 credit points AND must complete special requirement of type First Aid) OR Must complete 5 credit points

The following table describes program stage rule variables.

Table 12–19 Program Stage Completion Rule Variables

Variable	Definition	Example
Numeric value	Number	Must complete 24 credit points
Unit Code	Currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	Currently defined grading schema code	With grade of at least Standard.C
Grade	Currently defined grade within grading schema	With grade of at least Standard.C
Special Requirement Code	Currently defined special requirement code	Must complete special requirement of type First Aid
Program Stage Code	Currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	Currently defined unit set category	Must have completed 1 primary unit sets of category Major

The following table describes operators for test score rules.

Table 12–20 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	None
{	None
Valid Test Type	Enter a valid Test Type code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	None
with a composite score	Student composite test results are entered on IGSAD045 Direct Admissions.
greater than, greater than or equal to, less than, or less than or equal to	Scores are numeric so you can create comparative statements for them.
a number*	Enter a number representing the test score
Parse Successful or AND or OR	You can end rule or create additional unit version rules
Example	Must have achieved test type of {SAT1} with a score >= 550. Must have achieved test type of {SAT1} with a score greater than or equal to 550 OR Must have earned

The following table describes additional test score rule operators.

Table 12–21 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	None
{	None
Valid Test Type	Enter TEST TYPE code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	None
with a grade	Student test results are entered on IGSAD045 Direct Admissions.

Table 12–21 (Cont.) Test Score Rule Operators

Operator	Definition
equal to or not equal to	Grades are user-defined values such as EXCELLENT, POOR, PASS, FAIL. You must indicate which grades are not are not valid to fulfill the prerequisite statement.
{	None
a grade	Enter a valid grade
, or }	You can enter more than one grade. Multiple grades are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
Example:	Must have achieved test type of {Writing Proficiency} with a grade equal to {PASS}

The following table describes additional test score rule operators.

Table 12–22 Test Score Rule Operators

Operator	Definition
Must have achieved test type of	None
{	None
Valid Test Type	You enters TEST TYPE code. If partial code is entered, list of matching codes is displayed. Test Types are setup on IGSAD025 Admission Test Types.
}	None
and a test segment of	None
{	None
Valid Test Segment Name	Enter valid Test Segment code. If partial code is entered, list of matching codes is displayed. Test Segments are attached to Test Types and are setup on IGSAD025 Admission Test Types.
}	None
with a segment test score	Student test segment results are entered on IGSAD045 Direct Admissions.

Table 12–22 (Cont.) Test Score Rule Operators

Operator	Definition
greater than, greater than or equal to, less than, or less than or equal to	Scores are numeric so you can create comparative statements for them.
a number	Enter a number representing the test score
Parse Successful or AND or OR	You can end rule or create additional unit version rules
Example:	Must have achieved test type of {SAT1} and a test segment of {Verbal} with a composite score greater than 700.

The following table describes additional test score rule operators.

Table 12–23 Test Score Rule Operators

Operator	Definition
Must have achieved placement of	None
{	None
Valid Unit Code	Enter Unit code. If partial code is entered, list of matching codes is displayed. Unit Test placements are based on setup data from IGSAD060 Unit Placement and are displayed on IGSAD065 View Unit Placement Details.
}	NA
Parse Successful or AND or OR	You can end rule or create additional unit version rules
Example:	Must have achieved placement of {SPANISH101} or Must have taken (SPANISH001).

The following table describes operators for program rules.

Table 12–24 Program Rule Operators

Operator	Definition
Must be enrolled in	None
{	None

Table 12–24 (Cont.) Program Rule Operators

Operator	Definition
a program	Enter valid Program code. If partial code is entered, list of matching codes is displayed. On validation the system will check for program attempts with statuses equal to Enrolled, Inactive, and Completed. Program Attempts with statuses of Unconfirmed, Discontinued, Intermitted and Lapsed will not satisfy the prerequisite rule.
, or}	You can enter more than one Program Code. Multiple codes are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
(	None
)	None
OR	None
Example:	Must be enrolled in {BAHIST} Must be enrolled in {BAHIST, BAPOLSCI, BAPHILO} Must be enrolled in {BAHIST} OR Any passed pre-req unit in{ID300, ID400}

The following table describes operators for unit set rules.

Table 12–25 Unit Set Rules Operators

Operator	Definition
Must be enrolled in	None
{	None
a unit set	Enter valid Unit Set code. If partial code is entered, list of matching codes is displayed. On validation the system will check for confirmed unit set attempts in program attempts with the status of Enrolled, Inactive or Completed.
, or }	You can enter more than one Unit Set code. Multiple codes are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
(	None

Table 12–25 (Cont.) Unit Set Rules Operators

Operator	Definition
)	None
OR	None
Example:	Must be enrolled in {BAHIST} Must be enrolled in {BAHIST, BAPOLSCI, BAPHILO} Must be enrolled in {BAHIST} OR Any passed pre-reg unit in {ID300, ID400}

The following table describes operators for organizational unit rules.

Table 12–26 Organizational Unit Rules Operators

Operator	Definition
Must have passed <numeric value>..	A student must equal or exceed (in this Student Program Attempt) the given numeric value of credit points or units from the subsequent option selected. The possible options follow.
..credit points	Definition: Student has achieved the nominated number of credit points in the student course attempt. Example. Must have passed 8 credit points
..credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit. Example. Must have passed 8 credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 credit points at levels {2} from units owned by {0016}
..credit points from units owned by {Org Unit Code}	Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit. Example. Must have passed 4 credit points from units owned by {0016}
(	None
)	None
OR	None
Must have passed or be enrolled in	None

Table 12–26 (Cont.) Organizational Unit Rules Operators

Operator	Definition
Parse Successful or AND or OR	You can end rule or create additional unit version rules

Syntax for Passed + Enrolled Credit Points Rule (Note: I/W stands for institution wide)

Must have passed...

..(I/W) credit points

..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]

..(I/W) credit points from units owned by {Org Unit Code}

The following table describes enrolled credit points operators.

Table 12–27 Enrolled Credit Points Operators

Operator	Usage
Must have passed <numeric value>..	A student must equal or exceed the given numeric value of credit points or units from the subsequent option selected (includes units completed in other program attempts). The possible options follow.
..(I/W) credit points	Definition: Student has achieved the nominated number of credit points, including all credit points achieved in other program attempts. Example. Must have passed 8 (I/W) credit points
..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit. Example. Must have passed 8(I/W) credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 (I/W) credit points at levels {2} from units owned by {0016}
..(I/W) credit points from units owned by {Org Unit Code}	Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit. Example. Must have passed 4 (I/W) credit points from units owned by {0016}
Parse Successful or AND or OR	You can end rule or create additional unit version rules

To satisfy the current requirement that passed and enrolled unit attempts be considered, 4 new rules will be created which validated against the sum of passed credit points and enrolled credit points in teaching periods which start prior to the teaching period in which the student is attempting to enroll. The four new rules will read as follows:

Must have passed *or be enrolled in...*

..(I/W) credit points

..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]

..(I/W) credit points from units owned by {Org Unit Code}

The following table describes enrolled credit points operators.

Table 12-28 Enrolled Credit Points Operators

Operator	Usage
Must have passed or be enrolled in <numeric value>..	A student must equal or exceed the given numeric value of credit points or units from the subsequent option selected (includes units completed in other program attempts). The possible options follow.
..(I/W) credit points	Definition: Student has achieved the nominated number of credit points, including all credit points achieved in other program attempts. Example: Must have passed 8 (I/W) credit points
..(I/W) credit points at levels {Unit Level/s} [from units owned by {Org Unit Code}]	Definition: Student has achieved the entered number of credit points, at the selected level. This can be further qualified with a limit on the owning organizational unit. Example: Must have passed 8(I/W) credit points at levels { 3 } or, with limits on unit ownership. Must have passed 4 (I/W) credit points at levels {2} from units owned by {0016}
..(I/W) credit points from units owned by {Org Unit Code}	Definition: Student has achieved the entered number of credit points, from units owned by the nominated organizational unit. Example: Must have passed 4 (I/W) credit points from units owned by {0016}
Parse Successful or AND or OR	You can end rule or create additional unit version rules

The following table describes operators for program stage rules.

Table 12–29 Program Stage Rule Operators

Operator	Usage
Must have completed a stage of	None
{	None
a valid Program Stage Code	Enter a valid Program Stage code, if partial code is entered, list of matching codes is displayed
, or }	You can enter more than one Person ID Group code. Multiple codes are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
(	None
)	None
OR	None
Example:	Must have completed a stage of {YEAR2}

The following table describes operators for person reference types rules.

Table 12–30 Person Reference Types Rule Operators

Operator	Usage
Must be a member of	None
{	None
a valid Person Reference Type Code	Enter a valid Person Reference Type code, if partial code is entered, list of matching codes is displayed. Only people with active Person Reference Types are validated.
, or }	You can enter more than one Person Reference Type code. Multiple codes are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
(	None
)	None
OR	None

Table 12–30 (Cont.) Person Reference Types Rule Operators

Operator	Usage
Example:	Must be a member of {LEGACY, HONORS} or Must have completed {HONOR101}

The following table describes operators for person ID group rules.

Table 12–31 Person ID Group Rule Operators

Operator	Usage
Must be a member of	None
{	None
a valid Person ID Group Code	Enter a valid Person ID Group code, if partial code is entered, list of matching codes is displayed. Only people with active Person ID Groups are validated.
, or }	You can enter more than one Person ID Group code. Multiple codes are separated by commas.
Parse Successful or AND or OR	You can end rule or create additional unit version rules
(	None
)	None
OR	None
Example:	Must be a member of {DEANF01, PSCHOLF01} or Must have completed {HONOR101}

The following describes operators for special permission rules:

Must have special permission

Parse Successful or AND or OR: You can end rule or create additional unit version rules

:

)

Example: Must have special permission.

The following describes set of articulated course operators.

:

)
OR

12.22.2.1 Setting Up Program Stage Rules

Set up program stage rules.

Navigation

Program Structure and Planning > Program > Program Stages > Program Stage Rules

Additional Notes and Business Rules

Defined Lamp: Defaults to Undefined if rule is not defined in Rule window.

12.22.3 Unit Version Rules

The unit version rules determine conditions that must be met prior to enrollment in a unit. Unit version rules are viewed in the Unit Version Rules window.

Rules for unit versions are unique to the unit code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Oracle Student System.

The following table describes unit corequisite rule syntax and operators.

Table 12–32 Unit Corequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Any co-req unit in {}	students must be enrolled in unit included in set that follows	Any co-req unit in {MAA101, MAA102} Result: Returns true if student enrolls in either MAA101 or MAA102
Any passed co-req unit in {}	students must be co-enrolled in unit included in set that follows, and must have passed it	Any passed co-req unit in {MAA201, MAA202} Result: Returns true if student enrolls in and passes MAA201 or MAA202
{}	start and end of unit set definition	{MAA101, MAA102}

Table 12–32 (Cont.) Unit Corequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
,	separator between unit codes	{MAA101, MAA102}
.	separator between unit code and version number	{MAA101.2, MAA102.3}
-	range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
AND	logical and	Any co-req unit in {MAA101, MAA102} and Any passed co-req unit in {MAA201, MAA202}
Any co-req unit set	valid set code	None
Any co-req unit sets of Category	unit set category	None
Any passed co-req unit in	valid unit code	None
Must be in a course owned by	org unit	None
Must be enrolled in a course type	program type	None
Must be enrolled in a course version	NA	None
(	NA	None
)	NA	None
OR	None	None

The following table describes unit corequisite rule variables.

Table 12–33 Unit Corequisite Rule Variables

Variable	Description
%	Used to select multiple units

Table 12–33 (Cont.) Unit Corequisite Rule Variables

Variable	Description
Unit codes	Unit codes
Number	Number from zero to nine
Unit sets	Unit set codes

The following table describes unit incompatible rule syntax and operators.

Table 12–34 Unit Incompatible Rule Syntax and Operators

Syntax / Operator	Definition
Incompatible with	Valid unit code
Incompatible with achievement in	Valid unit code
(	None
)	None
OR	None

The following table describes unit compatible rule variables.

Table 12–35 Unit Incompatible Rule Variable

Variable	Description
%	Used to select multiple units
Unit codes	Unit codes
Number	Number from zero to nine
Unit sets	Unit set codes

The following table describes unit prerequisite rule syntax and operators.

Table 12–36 Unit Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Any passed pre-req unit in {}	Student must be enrolled in unit included in following set, and must have passed it	Any passed pre-req unit in {MAA101, MAA102}

Table 12–36 (Cont.) Unit Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Any pre-req unit in {}	Student must be enrolled in unit included in following set	Any pre-req in {MAA101, MAA102}
{}	Start and end of unit set definition	{MAA101, MAA102}
,	Separator between unit codes	{MAA101, MAA102}
.	Separator between unit code and version number	{MAA101.2, MAA102.3}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
AND	Logical and	Any passed pre-req unit in {MAA101, MAA102} AND Any pre-req in {MAA101, MAA102}
Must be a member of	Reference type	None
Must be currently enrolled in	Valid unit code	None
Must be enrolled in course version	Valid program code	None
Must be member of	Person ID group	None
Must have achieved test type	Test type	None
Must have achieved placement of	Unit placement	None
Must have achieved test type	Test type	None
Must have completed a stage of	Program stage	None
Must have course GPA equal to or greater than	Valid number	None
Must have course WAM equal to or greater than	Valid number	None
Must be enrolled in credit points	Number	None

Table 12–36 (Cont.) Unit Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
Must be enrolled in a unit	Valid unit code	None
Must have passed	Valid number of credit points, credit points at level	None
Must have passed a unit in	Valid unit code	None

The following table describes unit prerequisite rule variables.

Table 12–37 Unit Prerequisite Rule Variable

Variable	Description
%	Used to select multiple units
Unit codes	Unit codes
Number	Number from zero to nine
Unit sets	Unit set codes

The following table describes unit translation set rule operators.

Table 12–38 Unit Translation Set Rule Operators

Operator	Definition	Example
{ }	Start and end of unit set definition	{MAA101, MAA102}
,	Separator between unit codes	{MAA101, MAA102}
.	Separator between unit code and version number	{MAA101.2, MAA102.3}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
Unit was previously coded	Valid unit code	NA

The following table describes unit translation set rule variables.

Table 12–39 Unit Translation Set Rule Variables

Variable	Description
%	Used to select multiple units
Unit codes	Unit codes
Number	Number from zero to nine
Unit sets	Unit set codes

12.22.3.1 Setting Up Unit Version Rules IGSPS061

Inquire about the unit version rules attached to a particular unit version and accesses the window used to create and edit rules. Rules that pertain to unit versions include the following:

- Unit Co-requisite
- Unit Incompatible
- Unit Prerequisite
- Unit Translation Set

Navigation

Program Structure and Planning > Unit > Unit Version Rules

Additional Notes and Business Rules

Undefined Label: If no rule text is entered for a program version, an Undefined label is displayed adjacent to the rule description.

12.22.4 Unit Set Rules

Rules for unit sets are unique to the unit set code and version number. The rule description determines the available syntax and returns BOOLEAN true or false to Student System. The unit set rules determine conditions that must be satisfied prior to enrollment in a unit set, or whether the completion requirements of the unit set are satisfied. Unit set rules are viewed in the Unit Set Rules window.

The following table describes unit set prerequisite rule syntax and operators.

Table 12–40 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
{}	Start and end of unit set definition	{ACC-MAJ1, ACC-MIN2}
,	Separator between unit set codes	{ACC-MAJ1, ACC-MIN2}
.	Separator between unit set code and version number	{ACC-MAJ1, ACC-MIN2}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit set version	{MAA101.[1,3-10], MAA102.3}
Student must have or been granted advanced standing equal to or greater than <numeric value> credit points	Before specifying unit set, student must have advance standing equal to or greater than specified number of credit points	Student must have or been granted advanced standing equal to or greater than 8 credit points Result: Returns true if student has 8 or more credit points of advance standing
Student must have completed studies in Unit Set {}	Before specifying unit set, student must complete studies in unit set	Student must have completed studies in Unit Set {ACC-MAJ1, ACC-MIN2} Result: Returns true if student completes ACC-MAJ1 or ACC-MIN2 unit sets
(	None	None
)	None	None
OR	None	None

The following table describes unit set prerequisite rule variables.

Table 12–41 Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
{}	Start and end of unit set definition	{ACC-MAJ1, ACC-MIN2}

Table 12–41 (Cont.) Unit Set Prerequisite Rule Syntax and Operators

Syntax / Operator	Definition	Example
,	Separator between unit set codes	{ACC-MAJ1, ACC-MIN2}
.	Separator between unit set code and version number	{ACC-MAJ1, ACC-MIN2}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit set version	{MAA101.[1,3-10], MAA102.3}
Student must have or been granted advanced standing equal to or greater than <numeric value> credit points	Before specifying unit set, student must have advance standing equal to or greater than specified number of credit points	Student must have or been granted advanced standing equal to or greater than 8 credit points Result: Returns true if student has 8 or more credit points of advance standing
Student must have completed studies in Unit Set {}	Before specifying unit set, student must complete studies in unit set	Student must have completed studies in Unit Set {ACC-MAJ1, ACC-MIN2} Result: Returns true if student completes ACC-MAJ1 or ACC-MIN2 unit sets
(	None	None
)	None	None
OR	None	None

The following table describes unit set prerequisite rule variables.

Table 12–42 Unit Set Prerequisite Rule Variables

Variable	Description
%	Used to select multiple units
Unit codes	Unit codes
Number	Number from zero to nine

Table 12–42 (Cont.) Unit Set Prerequisite Rule Variables

Variable	Description
Unit sets	Unit set codes

The following table describes unit set completion rule syntax.

Table 12–43 Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must pass <numeric value> credit points	None	Student achieves or exceeds specified number of credit points for program stage	Must pass 8 credit points	Returns true if student has 8 or more credit points or advanced standing
None	At levels <numeric value> {Unit Levels} with no more than <numeric value> credit points of pass conceded	Student achieves or exceeds specified number of credit points at specified level; qualified with pass conceded at level limit	Must pass 8 credit points at level 1 Must pass 8 credit points at level 1 with no more than 2 credit points of pass conceded	Second example returns true if student has 8 or more credit points at level 1 and maximum of two of 8 credit points achieved through special Pass Conceded grade

Table 12–43 (Cont.) Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
None	In {} with grade of at least <Grading Schema.Grade >	Student passes, or is granted advanced standing for, specified number of credit points from set of units; valid unit code or set of codes is entered in braces; qualified with minimum grade value selected from grading schema	Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} Must pass 3 credit points in {ADH601, ADH602, ADH603, ADH604} with grade of at least STANDARD.C	Second example returns true if student achieves 3 credit points from listed units, with at least a credit result
None	Not in {}	student passes, or is granted advanced standing for, specified number of credit points from units other than those in entered braces; valid unit codes are entered in braces	Must pass 4 credit points not in {ADH601, ADH602, ADH603, ADH604}	Returns true if student passes 4 units from units not listed
None	With no more than <numeric value> with credit points in {Unit Codes} with no more than <numeric value> credit points of pass conceded	Student achieves or exceeds entered number of credit points for student program attempt; qualified by specified units or specified pass conceded limit	Must pass 8 credit points with no more than 2 credit points of pass conceded	Returns true if student has 8 or more credit points, and maximum of 2 of 8 credit points achieved through special Pass Conceded grade

Table 12–43 (Cont.) Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must pass <numeric value> units in {} with grade of at least <Grading Schema Code.Grade>	None	Student passes, or is granted advanced standing for, specified number of units, but with no more than the specified number of units coming from those in unit code list; valid unit codes are entered in braces	Must pass 5units with no more than 2 units in {ADH601, ADH602, ADH603, ADH604}	Returns true if student passes 5 units with no more than 2 from listed units, with at least a credit result
Must pass all units in {}	None	Student passes, or is granted advanced standing for, all units inside braces	Must pass all units in {ADH601, ADH602, ADH501}	Returns true if student passes all listed units
Must pass credit points for program with no more than <numeric value> credit points at levels {}	None	Student must equal or exceed program version credit points required value, with no more than specified number of credit points from specified level, for a student program attempt	Must pass credit points for program with no more than 2 credit points at level {1}	Returns true if student has no more than 2 credit points at level {1}
Must complete all units in {}	None	Student completes, or is granted advanced standing for, all units in list of units; qualified with valid unit code or set of codes inside braces	Must complete all units in {ADH601, ADH602, ADH501}	Returns true if student completes all listed units

Table 12–43 (Cont.) Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
Must complete special requirement of type <Special Requirement Code>	None	Student completes special requirement; qualified by selecting from resulting list of defined special requirements	Must complete special requirement of type First Aid	Returns true if student has current First Aid certificate
Must complete stage of type <Program Stage Code>	None	Student completes program stage type; qualified by selecting from resulting list of defined program stages	Must complete stage of type Year-01 AND Must complete stage of type Year-02 AND Must complete stage of type Year-03	None
Must have completed <numeric value>	None	Student must complete specified number of unit sets out of selected category Note: These categories include primary unit sets of category <Unit Set Category>, unit sets in braces, and unit sets of category <Unit Set Category>. They are described in this table.	NA	None
None	primary unit sets of category <Unit Set Category>	Tests if specified number of primary unit sets from selected category are completed	Must have completed 1 primary unit sets of category Major	None

Table 12–43 (Cont.) Unit Set Completion Rule Syntax

Syntax	Additional Details	Definition	Example	Result
None	unit sets in {}	Tests if specified number of unit sets are completed; qualified with valid unit code or set of codes inside braces	Must have completed 1 unit sets in {Media, Production}	None
NA	unit sets of category <Unit Set Category>	Tests if specified number of unit sets from selected category are completed; qualified by selecting from resulting defined unit set categories	Must have completed 1 unit set of category Major AND Must have completed 1 unit set of category Minor	None

The following table describes unit set completion rule operators.

Table 12–44 Unit Set Completion Rule Operators

Operator	Definition	Example
()	Parentheses, to force execution order	(1+3)/4 is not the same as 1+3/4
{}	Start and end of unit or unit set definition	{ACC-MAJ1, ACC-MIN2}
,	Separator between unit or unit set codes	{ACC-MAJ1, ACC-MIN2}
.	Separator between unit or unit set code and version number	{ACC-MAJ1.2, ACC-MIN2.3}
-	Range of version numbers	{MAA101.[1,3-10], MAA102.3}
[]	Start and end of unit version set	{MAA101.[1,3-10], MAA102.3}
%	Used to select multiple units or other codes	{A%} for all units that start with A

Table 12–44 (Cont.) Unit Set Completion Rule Operators

Operator	Definition	Example
AND	Logical and	(Must complete 3 credit points AND Must complete special requirement of type First Aid) OR Must complete 5 credit points
OR	Logical or	(Must complete 3 credit points AND must complete special requirement of type First Aid) OR Must complete 5 credit points

The following table describes unit set completion rule variables.

Table 12–45 Unit Set Completion Rule Variables

Variable	Definition	Example
Numeric value	Number	Must complete 24 credit points
Unit Code	Currently defined unit code	{SCC111, ABC%, %121} for unit SCC111 + all units that start with ABC + all units that end in 121
Grading Schema Code	Currently defined grading schema code	with grade of at least Standard.C
Grade	Currently defined grade within grading schema	with grade of at least Standard.C
Special Requirement Code	Currently defined special requirement code	Must complete special requirement of type First Aid
Program Stage Code	Currently defined program stage code	Must complete stage of type Year-01
Unit Set Category	Currently defined unit set category	Must have completed 1 primary unit sets of category Major

12.22.5 Unit Section Version Rules IGSPS102

You can view the unit version rules attached to a particular unit version. You can also modify the rule if it is required for a specific unit section. Unit section version rules include the following rules:

- Unit Co-requisite rule
- Unit Pre-requisite rule

These rules are automatically inherited from units. You can modify rules that are specific to a unit section.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Unit Section Version Rules > Unit Section Version Rules

Additional Notes and Business Rules

Rule display: Rules are displayed at unit section level only if they are defined at the unit level.

Rule Text field: This field displays the rule detail.

Override Value: Click the **Override Value** button to override the values inherited from the unit level.

13.1 Oracle Student System Inquiries

You can communicate with prospective students to make the best possible fit between the interests and aptitudes of prospective students and the offerings and opportunities you provide. That effort can range from simply responding to prospective student queries through Oracle Student System inquiries to the implementation of a more rigorous recruiting program using Oracle Sales and Marketing integration.

Inquiry records are created when prospective students use the online self-service Oracle Student System inquiry pages or inquiry information is recorded in windows by back office staff. Recruiters can manage this information in a consistent manner, whether it originates from Oracle Student System inquiries or from the Oracle Sales and Marketing integration.

Oracle Student System inquiry instances and package item processing records are included in the Oracle Customer Interaction History log along with the records of other activities initiated the Oracle Sales and Marketing integration. This allows the Recruiter to easily access a comprehensive record of all the interactions involving a prospective student.

13.2 Setting Profile Options

See Chapter 5, "Other Oracle Applications and Tools" for information about setting profile options.

Profile Options for JTF

You must set the JTF profile options at both the site and application levels. You can set the same value at the site and the application levels. These seeded values enable you to save information.

- **IGS: JTF Outcome:** Set to determine the outcome of an interaction between prospective student and recruiter; for example, collateral material
- **IGS: JTF Reason:** Set to determine the reason for initiation of interaction between prospective student and recruiter; for example, Inquiry
- **IGS: JTF Resource:** Set to determine the recruiters
- **IGS: JTF Result:** Set to determine the result of interaction; for example, Applying to Institution

See Appendix B, "Oracle Student System Profile Options" for detailed information about these profile options.

Profile Options for Oracle Marketing

You must set the following profile options at both the site and application levels to create Package Item as deliverables.

- **IGS: AMS CATEGORY TYPE**
- **IGS: AMS CATEOGRY SUB TYPE**

Note: You must set the **IGS: AMS CATEGORY TYPE** profile option, save the record and close the window before setting the **IGS: AMS CATEGORY SUB TYPE** profile option.

See Appendix B, "Oracle Student System Profile Options" for detailed information about these profile options.

13.3 Setting Up Descriptive Flexfields

You must compile the following descriptive flexfield segments:

- Prospective Account Inquiry
- Inquiry Instance

These flexfields are required to enter an inquiry in self-service or to enter descriptive flexfield information in windows.

See *Oracle Applications Flexfields Guide* for information about setting up descriptive flexfields.

The Prospective Account Inquiry and Inquiry Instance flexfields are required. See Chapter 5, "Other Oracle Applications and Tools" for information about optional descriptive flexfields in Oracle Student System.

13.4 Setting Up Inquiry Packages

Inquiry packages allow you to set up information to track a student's inquiries to your institution.

13.4.1 Setting Up Inquiry Package Items IGSRC004

Describe and keep track of printed items that can be sent to a person making an inquiry. Inquiries can be for an organization unit, discipline, or program or general for the institution.

The Inquiry Package Items window generates a list of inquiry package items according to the details entered for an applicant in the Record Inquiries window. Package items are displayed by clicking **Package Item** in the Record Inquiries window. Some examples of inquiry package items are viewbooks and brochures.

Inquiry Package Items are collateral sent to prospective applicants. Oracle Marketing provides a comprehensive solution to manage the lifecycle of collateral items from definition to fulfillment and distribution. Package Items created in Oracle Student System Inquiry are saved as Deliverables in Oracle Marketing.

See *Oracle Marketing Implementation Guide* for more information about Deliverables functionality in Oracle Marketing.

Inquiry Package Items are linked to Oracle Marketing deliverables. Oracle Marketing supports two types of Deliverables: physical deliverables, such as a flyer or printed information, and electronic deliverables, such as an electronic brochure or email attachment.

Note: After being used in Student System, inquiry package items cannot be deleted. A message is displayed if user try to close an inquiry package item that is used in other packages. Inquiry package items are retrieved by querying the system.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Package Items

Additional Notes and Business Rules

Inquiry Package Item field: Default is effective from date of entry.

Publish in Self Service check box: If selected, then inquiry package item is available in self-service pages.

13.4.2 Setting Up Inquiry Information Types IGSRC001

Use these windows to establish a list of information types and their associated package items for back office functions.

Setting Up Inquiry Information Type

These codes describe a grouping of information that can be sent to a person making an inquiry. Codes include program, fees, and accommodation. Each information type can have one or many inquiry package items.

Prerequisites

Inquiry package items are set up.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Information Types

Setting Up Inquiry Information Type Package Items

Set up inquiry information type package items.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Information Types > Package Items > Inquiry Information Type Package Items

13.5 Inquiry Self-Service Setup

Set up Inquiry self-service.

13.5.1 Setting Up Form Functions FNDFMFUN

Set up form functions.

See *Oracle Applications System Administrator's Guide* for more information.

13.5.2 Setting Up Menus FNDMMNU

Set up menus.

See *Oracle Applications System Administrator's Guide* for more information.

13.5.3 Setting Up Inquiry Entry Statuses IGSRC006

Set up entry information for a person. An example of an inquiry entry status is Returning Sophomore. Entry statuses can be linked to organizational units and inquiry programs.

You can set the hierarchy in the following ways:

- All three levels: entry status, inquiry program, inquiry unit set
- Two levels: Entry Status, Inquiry Program. No Unit Sets are defined.
- All three levels: Entry Status, Inquiry Program, Inquiry Unit Set, but only defines one single Inquiry Program, for example, All

Oracle Student System Inquiry Programs and Inquiry Unit Sets are synchronized with Oracle Sales Online's (OSO) interest type, in which the data is stored in OSO Interest Types table. However, OSO interest types do not support all Oracle Student System specific attributes such those recorded in the Import Source Type, Package Item Reduction, and Institution Type fields.

After you have completed the setup for Entry Status, the defined Inquiry Program or Inquiry Unit Set appears in OSO as Interest type with all the mandatory fields populated. However, interest types defined in OSO do not appear in the Oracle Student System Entry Status window.

See *Oracle Sales Online Implementation Guide* for more information about Interest information in OSO.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses

Additional Notes and Business Rules

Restrictions: Inquiry program and inquiry unit set cannot be setup independently or reused. inquiry program can only be defined within one entry status. Inquiry unit set can only be defined within one inquiry program. Inquiry unit sets no longer link to entry status directly.

13.5.3.1 Self-Service Configuration

Configure self-service web inquiry for an entry status.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Self Service Configuration

13.5.3.2 Inquiry Entry Status Self Reported Test Types

Set up self-reported test types corresponding to an inquiry entry status. The test types selected will appear in the test type list of values for a specific self-service inquiry configuration.

Prerequisites

Admission test types are set up.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Test Types > Inquiry Entry Status Self Reported Test Types

13.5.3.3 Setting Up Inquiry Entry Status Organizational Units

Set up organizational units for a given inquiry entry status.

Prerequisites

Import source types are set up.

Institution types are set up.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Organizational Units > Inquiry Entry Status Organizational Units

13.5.4 Setting Up Inquiry Entry Programs IGSRC008

Establish a list of inquiry programs for an entry status.

Inquiry programs must be unique within an inquiry entry status. However, for different entry statuses, inquiry programs can have the same name. Even Inquiry programs sharing the same name are different inquiry programs. For example, if two inquiry programs with the same name are each connected to two different inquiry entry statuses, each inquiry program will have its own primary interest code.

The defined Inquiry Program will appear in OSO as Primary Interest Code. Primary interest codes defined in OSO will appear in Oracle Student System as Inquiry Program.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Inquiry Entry Program > Inquiry Entry Program

13.5.5 Setting Up Inquiry Unit Sets IGSRC009

Establish a list of inquiry units for an inquiry program.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Statuses > Inquiry Programs > Inquiry Unit Sets > Inquiry Unit Sets

13.6 Inquiry Codes

Set up inquiry codes.

13.6.1 Setting Up Inquiry Entry Levels IGSRC007

Set up inquiry entry level codes. Inquiry entry levels differ from entry statuses. The entry levels are chronological; for example First Year and statuses are descriptive; for example Returning Sophomore.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Entry Levels

13.6.2 Setting Up Inquiry Package Item Reduction IGSRC010

Set up reduction associations between package item and entry status, inquiry program, and inquiry unit set. This association is used to reduce the package items list displayed when selecting package items for both self-service and back office.

Prerequisites

Inquiry entry statuses are set up.

Inquiry package items are set up.

Navigation

Student Recruiting > Setup > Setup Inquiries > Package Item Reduction

13.6.3 Setting Up Inquiry Detail Codes IGSAD058

Set the Inquiry Detail Codes for both classes: How did you learn about us and Who influenced you to inquire.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Detail Codes

Additional Notes and Business Rules

Disabled fields enabled only in the Admission Fee Information window:

- System Method
- System Default

13.6.4 Setting Up Inquiry Characteristic Types IGSRC002

These codes describe the attributes of an applicant. Examples of these user-defined codes include Adult Learner and Postgraduate.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Characteristic Types

13.6.5 Setting Up Inquiry Methods FNDLVMLU

The Oracle Marketing Lead Module has a field named Response Channel. This field is used to capture how users created a lead, and has essentially the same meaning as inquiry method. The Response Channel field is defined via the extensible Lookup Type Vehicle Response Code and set up in the Sales Lookup Codes window using the Oracle Sales Setup responsibility.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Methods

13.6.6 Setting Up Inquiry Statuses IGSRC003

Establish a list of user-defined inquiry statuses, which are mapped to the three system-defined inquiry statuses: Received (inquiry is received), Acknowledge (inquiry receipt is acknowledged) and Complete (package completed and sent). Although new Inquiry Statuses cannot be created, the name for each status can be updated.

The inquiry status indicates inquiry status and the status of package item requests.

See *Oracle Sales Online Implementation Guide* for more information about how lead statuses are used.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Statuses

13.6.7 Setting Up Inquirer Information IGSAD058

Enter user-defined codes for How did you learn about us and Who influenced you to inquire. These values are displayed in the list of values for the Record Admission Inquires window.

Navigation

Student Recruiting > Setup > Setup Inquiries > Inquiry Detail Codes > Inquirer Information

13.6.8 Setting Up Recruitment Information IGSAD058

Set up recruitment information.

Navigation

Student Recruiting > Setup > Recruitment Information

14.1 Admissions Overview

You can manage all aspects of the Admissions processes of your institution. After you have completed implementation for Oracle Student System, you can enter and receive inquiries and applications, process applications, make admission decisions, and administer admission fees.

14.2 Application and Government Codes

Set up data for statistics to be used for reporting to governments or other agencies. This setup is only required if you are reporting information to a government agency.

14.2.1 Setting Up Government Basis for Admission Types IGSST009

Enter government basis for admission types.

Navigation

Admission > Admission Setup > Setup Applications > Government Basis For Admission Type

14.2.2 Setting Up Basis for Admission Types IGSAD002

Map user-defined basis for admission types to government basis for admission types.

Prerequisites

Government basis for admission types are set up.

Navigation

Admission > Admission Setup > Setup Application > Basis for Admission Types > Basis for Admission Types

Additional Notes and Business Rules

Basis for Admission Type field: Enter the code of user-defined basis used to group admissions.

CAUTION: After bases for admission are used in a student's international application details, they cannot be deleted.

Mapping: You can map more than one user-defined basis for admission type to a government-defined basis for admission type.

14.2.3 Setting Up Government Admission Codes IGSAD004

Enter government admission codes.

Navigation

Admission > Admission Setup > Setup Application > Government Admission Codes

14.2.4 Setting Up Admission Codes IGSAD003

Map user-defined admission codes to government admission codes.

Admission codes indicate the various types of admissions that can occur. Examples of admission codes include **Conditional**, **Standard**, and **Transfer**.

Prerequisites

Basis for admission types are set up.

Government admission codes are set up.

Navigation

Admission > Admission Setup > Setup Application > Admission Codes > Admission Codes

Additional Notes and Business Rules

Academic History Admission Center Admission Code: Enter an academic history admission center code such as transfer, readmit, normal, conditional admittance,

honors student, test scores. More than one user-defined admission code can map to an Academic History Admission Center admission code.

Basis for Admission Type: More than one institution admission code can be linked to a basis for admission type code.

14.3 Admission Intake Targets

Set up data for statistics to be used for reporting to governments or other agencies. If your institution does not require targets to be maintained for an organizational unit or program, the targets do not have to be entered.

The process for entering student intake targets includes the following steps:

1. Check that reference data is entered in the Student Target Types window.
2. Enter submission period targets in the Submission Intake Targets window.
3. Further define intake targets in the Program Student Targets window for each program and unit set, as required.

14.3.1 Setting Up Student Target Types IGSAD039

Student intake targets are enrollment targets used to enroll students with particular characteristics required by your institution.

Create student target types to describe applicant characteristics, for example, sight-impaired, commencing, returning, and total. These student target types indicate the characteristics of students that you want to admit.

The data entered for student target types is used in the Submission Intake Targets, Organizational Unit Student Targets, and Program Student Targets windows.

Navigation

Admission > Admission Setup > Setup Intake Targets > Student Target Types

Additional Notes and Business Rules

Amount Type: Enter an amount type for a user-defined student target type, used to calculate student fees. Examples include Full Time Equivalency (FTE), Person, Percentage, and Weighted Effective Full Time Student Units (WEFTSU).

14.3.2 Setting Up Government Snapshot Control IGSST018

Create government snapshots for specified submission periods, government semester and load calendars. Identify government semesters in which individual student unit attempts are reported and map load calendars to each of these semesters.

Each student unit attempt belongs to a particular teaching calendar that can incur load. A teaching calendar is associated with one or more load calendars in order to apportion load from the student unit attempts.

Prerequisites

Load calendar structure is set up.

Navigation

Setups > Government Reference > Snapshot Control

Additional Notes and Business Rules

Submission Year: The submission period for which intake target statistics are forwarded to government.

Submission Number: A system-generated unique submission number for submission year.

Enrollment Statistics Snapshot Date: The date when enrollment statistics snapshot is forwarded to government for the given submission year. The date appears when a snapshot is selected as a parameter in the Government Submission Snapshot concurrent process.

Completion Date: The end date for the submission period.

Semester: Enter only those government semesters that you use.

Government Semester Load Override: Opens the Government Semester Load Override window where you override the default load apportion for given load calendars.

Default Load Apportion: Opens the Default Load Apportion window where you view how the load for a given load calendar is distributed over teaching calendars.

14.3.3 Setting Up Submission Intake Targets IGSAD040

Enter submission student targets to establish the minimum quota of types of students that you want to recruit. These targets for the number of enrolled students who meet the defined characteristics can be reported on the census.

Prerequisites

Student target types are set up.

Government snapshot control is set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Submission Intake Targets > Submission Intake Target

Additional Notes and Business Rules

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.3.4 Setting Up Organizational Unit Student Targets IGSAD041

Organizational unit student targets are used for high level tracking of intake targets. Setting up intake targets at this level allows you to track at the department (organizational unit) level rather than the program or more specific level. For example, you can set up targets for an organization unit of **Department of Art**. Programs included in the Department of Art are Art, Theatre, and Music.

Maintain an offering period's organizational unit planning targets, for students enrolled at a census date within organizational units, and the funding source associated with the targets.

Within organizational unit and funding source combinations, targets can be further defined for program type, unit internal program level, and attendance mode.

If you do not require the maintenance of targets for an organizational unit, the targets do not need to be entered.

Prerequisites

Student target types are set up.

Organizational units are set up.

Funding sources are set up.

Government snapshot control is set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets
> Organizations Unit Student Targets

Additional Notes and Business Rules

Program Type Group(...): This button opens Organizational Unit Funding Source Program Type Group window for users to enter intake target values for an organizational unit by target and program type.

Attendance Mode(...): This button opens Organizational Unit Funding Source Attendance Mode window for users to define student intake targets for an organization by mode of attendance.

Unit Internal Program Level(...): This button opens Organizational Unit Funding Source Unit Internal Program Level window for users to define student intake targets for an organization by program level.

Intake Target Type: Enter the user-defined student target type to be offered admission in queried submission year.

Target: The target is the number of students of selected target type targeted for admission in queried submission year.

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.3.4.1 Setting Up Organizational Unit Funding Source Program Type Group

Define student intake target for admission for each program type for an organizational unit associated with a funding source, for example, ABC Company. Define targets for a combination of the program type, org unit, and funding source and set targets against this combination.

Prerequisites

Student target types are set up.

Program type groups are set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets

Additional Notes and Business Rules

Program Type Group: This field is the code and description of program type for which organizational unit's student intake targets are to be set.

Intake Target Type: Enter the user-defined student target type to be offered admission in queried submission year.

Target: The target is the number of students of selected target type targeted for admission in queried submission year.

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.3.4.2 Setting Up Organizational Unit Funding Source Attendance Mode

Define target and maximum values for student intake by mode of attendance, the organizational unit, and funding source.

Organizational unit funding source attendance mode targets break down the overall target to a more specific level.

Prerequisites

Student target types are set up.

Program attendance modes are set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets

Additional Notes and Business Rules

Attendance Mode: This field displays the code and description of attendance mode in queried submission year for which organization's student intake targets are to be set.

Intake Target Type: Enter the user-defined student target type to be offered admission in queried submission year.

Target: The target is the number of students of selected target type targeted for admission in queried submission year.

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.3.4.3 Setting Up Organizational Unit Funding Source Unit Internal Program

Define student intake targets at the program level for an organization and funding source. Organizational unit funding source unit internal program level targets set targets against the level of the program. The unit internal program level is the level of the program that is defined in Oracle Student System. Examples include Undergraduate and Graduate.

Prerequisites

Student target types are set up.

Unit internal program levels are set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Organizational Unit Targets

Additional Notes and Business Rules

Unit Internal Program Level: This field displays the code and description of program level in organizational unit for which student intake targets are to be set.

Intake Target Type: Enter the user-defined student target type to be offered admission in queried submission year.

Target: The target is the number of students of selected target type targeted for admission in queried submission year.

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.3.5 Setting Up Program Student Targets IGSAD042

Enter planning targets for students enrolled at census date to plan for the population/enrolled students and spaces necessary to handle the students to be enrolled. within programs, for all program offering options and unit set combinations, for a specific submission period.

Within program and funding source combinations, targets can be established for particular program offering patterns. They can be further defined to the unit set level within the program offering pattern.

If you do not require the maintenance of targets for a program, the targets do not need to be entered.

Prerequisites

Attendance type are set up.

Funding sources are set up.

Basic program details are set up.

Basic unit set details are set up.

Navigation

Admission > Admission Setup > Setup Intake Targets > Program Student Targets

Additional Notes and Business Rules

Funding Source: This field displays code of funding source for given program for which student targets mapped to given program code for the queried submission year.

Intake Target Type: Enter the user-defined student target type to be offered admission in queried submission year, program, funding source, and offering option.

Target: The target is the number of students of selected target type targeted for admission in queried submission year

Maximum: Maximum value must be greater than target value. For Person amount type, difference in values for target and maximum must be 0.5. For Percentage amount type, difference in values for target and maximum must be within 100.

Override Amount Type: You can change default amount type for given intake target type for the queried submission year.

14.4 Secondary and Tertiary Education Details

Map non-US institutions, terms, and concepts to government institutions, terms, and concepts of the United Kingdom.

14.4.1 Setting Up Secondary Education Schools Codes IGSAD014

Map secondary education school codes to system school types. These codes are government secondary school codes as listed in the relevant government manual or handbook. The codes indicate the school at which the final year of secondary education occurred.

After secondary education school codes are used in Oracle Student System, the codes cannot be deleted. Only minor modifications can be made to the codes.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Secondary Education Schools > Secondary Education Schools

Additional Notes and Business Rules

State: Enter the code of Australian states: ACT, NSW, NT, QLD, SA, TAS, VIC, WA.

14.4.2 Setting Up Government Levels of Qualification IGSAD019

Create government codes that define the level of qualification an applicant has obtained.

Prerequisites

Tertiary level of qualification are set up.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Qualification

Additional Notes and Business Rules

Government offer file: If a government offer file is loaded into Oracle Student System, Oracle Student System enters the level of qualification of the applicant's prior tertiary education. It is the user-defined value, derived from the government-supplied code, that is entered for the student.

Academic History Education Level of Qualification Codes: This button opens Tertiary Education Level of Qualification window for you to enter user-defined values for tertiary education qualification and map these to Tertiary Admission Center (TAC) levels of qualification.

14.4.3 Setting Up Tertiary Education Level of Qualification IGSAD015

The tertiary education qualification code indicates the level of qualification attributed to an applicant's previous tertiary education.

Optionally, map each code to a government level of qualification code. Mapping the tertiary education level of qualification code to a government level of qualification code enables data supplied by government to be converted into user-defined values to enter against an applicant.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Tertiary Level Qualification > Tertiary Level Qualification window

14.4.4 Setting Up Government Levels of Completion IGSAD020

Create government codes for the level of completion of tertiary studies.

Prerequisites

Tertiary education levels of completion are set up.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Levels of Completion

Additional Notes and Business Rules

Academic History Education Level of Completion Codes: This button opens Tertiary Education Level of Completion window for you to enter user-defined

levels of completion for tertiary education and map these to government levels of completion

14.4.5 Setting Up Tertiary Education Level of Completion IGSAD016

Create user-defined codes to describe an applicant's tertiary education level of completion.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Tertiary Level Completion

14.4.6 Setting Up Government Secondary Assessment Types IGSAD023

Create government secondary education assessment types.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Government Secondary Assessment Types

Additional Notes and Business Rules

Secondary Education Assessment Types: This button opens Secondary Education Assessment Types window for users to enter user-defined secondary assessment types by state and map these to government-defined secondary assessment types

14.4.7 Setting Up Secondary Education Assessment Types IGSAD021

Enter user-defined local secondary education assessment type codes.

Prerequisites

Government secondary assessment types are set up.

Navigation

Admission > Admission Setup- Setup Tertiary and Government Details > Government Secondary Assessment Types > Government Secondary Assessment Types

Additional Notes and Business Rules

Government Reported: Select the **Government Reported** check box for the assessment type if its scores are reportable. This indicates that related scores should be included in government statistical reporting. This check box also activates the Government Score Mapping button.

Recommendation: It is recommended that the mapping of user-defined codes to government codes be a one-to-one relationship. Government codes should also be used for the user-defined codes.

State: Enter the code of an Australian states such as ACT, NSW, NT, QLD, SA, TAS, VIC, WA.

Government Score Mapping: This button opens Government Score Mapping window for users to enter institution and map institution scores to government scores in a given year and state for an assessment type.

14.4.8 Setting Up Assessment Type Government Score Mapping IGSAD022

If the government agency of your country requires you to report the tertiary entrance scores of new students who have completed year 12 within your country in the prior year, you must enter details of prior secondary education qualifications of students. These details include the tertiary entrance score and assessment type of the qualification. To enable the reporting of a tertiary entrance score to a government agency, the assessment type must be flagged as government reported in the Secondary Education Assessment Types window. The score reported must be from the government agency's common tertiary index entrance scores. If you use other types of tertiary entrance scores, you must map these to the common index scores.

The process that extracts the tertiary entrance scores of students for government reporting purposes checks that the score belongs to a government-reported assessment type. If so, it checks if the assessment type score is mapped to an assessment type government score or common index score. If a mapping exists, the common index score is reported. If no mapping exists, the secondary education score entered for the student is reported.

Map user-defined secondary education scores for secondary education assessment types to government common index schema scores. This mapping should be performed for all scores within a secondary education assessment type and must be repeated for each year the scoring schema is used.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Secondary Education Assessment Types > Secondary Education Assessment Types

14.4.9 Setting Up Overseas Secondary Education Qualification IGSAD024

Create user-defined international secondary education qualification codes to indicate the level of qualification attributed to an applicant's international secondary education.

Each code can be mapped to a country code.

Navigation

Admission > Admission Setup > Setup Tertiary and Government Details > Overseas Qualification > Overseas Secondary Education Qualification

14.5 Admission Application Processing

Set up data and enter data for admission application processing and application evaluation.

Admission Process Categories

Similar applications are organized into processing groups called admission process categories. You define admission categories and map process steps to those categories, resulting in admission process categories.

Admission process categories describe broad categories such as undergraduate, graduate, and professional. After these categories are defined, you determine the admission process category steps that are required for the admission process category.

Admission process categories are then assigned to application instances as follows:

- Admission process categories are automatically assigned to the application instance when users select an application type in self-service.
- Admission process categories are assigned via the import process from third party vendors.
- Admission process categories are also assigned to an application instance in the Session Details window when creating a new application instance.

Tracking Missing Items in Applications

Associate admission process categories with tracking types and application instances in the Admission Process Category Detail window. This enables you to track missing items in applications.

In order to assign requirements to applications in addition to tracking type requirements, click **Rules** in the Admission Process Category Detail window to set up application completion rule sets. Specify rules that assign additional tracking types to a group of students and create new tracking items for those students.

The items will not be assigned to the application instance until you run the Assign Requirements to Application Instances concurrent process to assign these requirements.

Credentials

Credentials are materials other than applications needed for admission into institutions. Examples of credentials include the following:

- Recommendations
- Personal essays
- Portfolios

Required Documents

Each student who applies for admission has a set of requirements that he or she must complete. These requirements may be minimal or extensive.

Application completion rules governing which information or documents are required for each student can vary from one department to another in the same institution.

Oracle Student System allows you to:

- Manually add or delete requirements from an applicant's requirement set
- Update requirements when test scores or transcript are imported or manually entered
- Automatically establish an individualized communication track that is driven by missing items
- Track status of missing documents and requests for documents
- Define admission credential or specific required document sets based on applicant characteristics

- Associate requirement sets to admission process categories
- Itemize required credentials or documents based on students' characteristics and currently available documents
- Set requirements to include academic history record at post-secondary level for applicants who have the entry status of Transfer
- Track transcript data as unofficial, official, or other user-defined statuses
- Automatically determine when an application is complete

14.5.1 Setting Up Admission Categories IGSAD036

Enter user-defined admission categories to group applications. Examples of user-defined admission categories include award, non-award, professional, undergraduate, doctorate.

You can simultaneously map these to your enrollment, fee and payment categories. You can also place restrictions on program types for an admission category.

UK Note: UCAS applications are exported from the UCAS interface subsystem into Student System direct admissions. Define an admissions category which can be assigned to the UCAS applications on import.

Prerequisites

Student finance fee types are set up.

Enrollment categories are set up.

Program types are set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories

Additional Notes and Business Rules

Admission categories: Where an enrollment, fee, or correspondence category is mapped to a single admission category, one and only one of each must be set as the default. After admission categories are used in Oracle Student System, only minor description modifications can be carried out and cannot be deleted.

Contribution Option Mapping: This button opens Contribution Option Mapping window for you to map admission category to one or more payment options. This setup cannot be completed until fee types have been setup in Student Finance.

Fee Category Mapping: This button opens Fee Category Mapping window for you to map admission category to one or more fee categories.

Program Type Restrictions: This button opens Program Type Restrictions window for you to restrict admission category to one or more program types

Enrollment Category Mapping: This button opens Enrollment Category Mapping window for you to map admission category to one or more enrollment categories

Mapping Payment Option

You can require that applicants state the payment options to be used at the time of applying.

You can map an admission category to more than one contribution payment option. After mapping the admission category to a payment option, and if you assign the process category step of Fee Assessment to the admission process category (APC), you can enter contribution payment options in the Applications window.

Prerequisites

Contribution payment options are set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories

14.5.2 Fee Category Mapping

Map admission categories to fee categories assigning each a default fee category before you assign these to admission applications.

Prerequisites

Fee categories are set up.

Student finance is set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories

Additional Notes and Business Rules

Default: If selected, then fee category is set as the default for admission category. For each admission category users can specify only one of the fee categories mapped as default.

Setting Up Admission Category Program Type Restrictions

If you set up the program type restriction for the admission category, then the admission category can only be associated with programs that have that program type. If no restriction is set up, then the admission category can be used for any program type.

You can restrict an admission category to selected program types. For example, for the admission category of **Graduate**, the program type can be **Undergraduate** or **Non-award**.

You can further restrict an admission category to selected program offering options. If you restrict at the program offering options level, then prospective students can apply for only the specific offering option with which the admission category is associated.

Prerequisites

Program types are set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories

14.5.3 Enrollment Category Mapping

Map admission categories to enrollment categories before attaching these to admission applications. These mappings are used to control the category and processing involved within Enrollment. If not mapped, then Oracle Student System cannot enter a default category based on the admission category.

You can associate more than one enrollment category to an admission category, but can set only one as default for that category.

Prerequisites

Enrollment categories are set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Admission Categories

14.5.4 Setting Up Admission Process Category Detail IGSAD037

Map an admission category to system admission processes to create different admission process categories. Define the processing necessary for applications.

You map the admission category to a process category to create an *Admission Process Category (APC)*. This combination is how Oracle Student System knows what steps are required for the application to be complete and the applicant to be offered admission.

The following are system admission process types and their functions:

- **Program:** Used for typical direct admissions applications
- **Non-award:** Used for admission to nonaward programs or a single subject; for this process type, users can only enter units for which the Award Only indicator is set to No
- **Re-admit:** Used for applications for readmission to a previously discontinued program, where program code is identical to discontinued program code, but program offering option may be different; for such applications, offer response status can only be Accepted
- **Short Admission:** Short Admission can only happen in the period that comes after the Apps Due date alias and before the Final Due date alias. Short refers to the time period for submitting the application, not the length of the program.
- **Transfer:** Used when applicant is enrolled and is applying for transfer from one program to another

For each admission process category, you can specify steps for processing. You can assign steps to system step groups.

Possible category step types for a system step group include:

- **Person data:** Collects person information such as academic history, extra-curricular activities, credentials, secondary education, employment, recruitment details including mandatory person details such as aliases, addresses and holds
- **Step Group Program Data:** Comprises buttons required as steps in application processing such as ratings, outcome, offer response, interview, advanced standing, and fee assessment. The buttons do not disappear if they are not selected. The buttons appear on the window, but if they are not chosen as part of the APC setup, then you get error message if you try to access the window that is associated with the button.
- **Person Validation:** Allows the entry of the application to occur even without a title or date of birth being entered
- **Application Validation:** Validates application against person holds, late applications, program preferences

- **Program Data:** Collects program information such as admission test results, advanced standing, fee contract, application rating, key academic indicators, application outcome, offer response, research candidacy details
- **Program Validation:** Validates program against program offering options and against holds on program and unit sets
- **Unit Validation:** Validates program against program offering options and against holds on program and unit sets
- **Application Outcome:** Validates units against holds, pre-set restrictions
- **Application Offer Response:** Deals with application outcomes such as automatic offer, conditional offers, multiple offers, admission outcome overrides, automatic pre-enrollment on offer, and automatic fee contract on pre-enrollment
- **Application Details:** Deals with offer response statuses such as automatic offer acceptance, deferred admission
- **Mandatory Application Details:** Collects application-related information such as educational goals, intent, desired unit sets, interests and talents, financial aid, reconsideration
- **Tracking:** Deals with basic application details such as admission code, basis for admission type, mapped enrollment and fee categories, rank set, completion period, advanced standing. You can click **Tracking Type** to open the Tracking Types window and set individual tracking items for the step type and step group.
- **Rating Details:** Tracks general pre and post admission requirements as defined by the user in tracking program approval
- **Mandatory Person Details:** Collects basic person details such as addresses, aliases, holds, special needs, holds, international details

You can further assign Mandatory status to these steps. Assigning steps to an admission process category determines fields that are available to users for entry during application entry. Assigning Mandatory status to processing steps determines fields that you must enter for application processing to occur.

Admission Process Categories and Steps

Admission process categories represent the various admission processes of your institution and are established to group applicants or program types with similar admission requirements together. Oracle Student System can be configured to

accommodate these admission processes. Admission process categories define a particular admission procedure by specifying the steps involved in that procedure.

At the beginning of an Oracle Student System admission session, an admission process category is specified. If an existing application is modified within the same session, the admission process category already associated with the application is retained.

Enter the set of steps associated with each admission process in your institution. These steps are grouped according to the type of admission information involved. When an admission process category is created, Oracle Student System assigns to it the appropriate subset of steps from the set of all system steps. The procedure can be further refined by adjusting the order in which the steps are displayed.

Each step equates to a window or a database process, such as validation, to be performed within Admissions. For each step, the corresponding page or database process is displayed and can be used. For example, when the step Person Detail is specified for an admission process category, the **Person Detail Button** is displayed in the Direct Admission window and the Person Details window can be accessed when that admission process category is used for a session.

When a particular admission process category is used in an admission session, you can only access those navigation buttons and related windows required to perform the steps associated with that admission process category. The admission process category definition also determines whether certain activities such as accepting late applications or allowing deferment are permitted.

This program type populates a list of values in the Basic Program Details window.

Prerequisites

Admission categories must be set up.

Tracking types must be set up.

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Additional Notes and Business Rules

Nonaward program type: You must enter the government program type of 50 in the Government Program Types window and map this government program type of 50 with the program type in the Program Types window if you want to enter a

nonaward program code in the Applications window for an admission process category.

UK Note: Enter the admission process category details for the admissions category assigned to UCAS applications on import.

System Admission Process Type: For admission process type of Program, the Pref-Limit step can be set to enable users to enter preferences.

Offer Date Response Offset: This field defines the grace period in days, starting the day after the offer response deadline.

Admission Processing Rules: This button opens Admission Process Category Tracking Rules window for you to add and edit rules attached to an Admission Process Category (APC).

Post Admission Rules: This button opens Admission Process Category Tracking Rules window for you to add and edit post-admission rules attached to an APC.

Default Steps: For a new APC, this button attaches all the step types for the step group.

Process Category Step Type: This field is the step type for step group of APC.

System Tracking Type: This field displays system tracking type associated with step type used to differentiate between admission processing and post admission requirements.

Number Restriction: In this field, set a limit on step type. This field is enabled only if number restriction is Y for step type.

Step Order: This field defaults to sequential order for step types selected. You can change the order of step types.

Mandatory: If selected, the step type must be completed for the step group and APC. For step types other than Person Details, Unit Placement, Key Academic Indicators and Ratings, you can change or update mandatory status.

Tracking Types: This button opens the Tracking Types window for you to create tracking types or step types for the Tracking step group. This button is enabled only for the Tracking step group.

14.5.5 Rule

Set up Admissions rules.

See Chapter 28, "Modifying and Adding Rules" for more information.

14.5.6 Setting Up Admission Process Category Tracking Rules IGSAD079

Set up rules for admission processing and post admission tracking for an admission process category. Each rule returns one or more tracking types depending if the applicant satisfies the conditions defined in the rule. Rules defined for an APC are validated and the tracking requirements or the tracking types attached to the student during admission by running the Assign Requirements to Application Instances concurrent process to assign the requirements, or by clicking the **Assign Requirements** button to assign for the specific application instance.

For example, if the process category step type is **Undergraduate Freshman**, and there is a rule that includes another tracking step type in the Then clause, any rule tracking types are assigned in addition to the APC base tracking types. Whenever requirements are assigned, base APC tracking types and any applicable tracking types defined using rules are assigned together.

Navigation

Admission > Admission Setup > Setup Admission Process > Process Category Details

Additional Notes and Business Rules

APC rules: Query for the APC for which you plan to define a Rule. Once the APC is in context, click on either the Admission Processing Rules or the Post Admission Rules button. Each button ensures that the Rules defined on the following windows will be marked in the system as Admission Processing or Post Admission.

Entering rules: Rules can be entered manually in the Rule Text tab in the window, or Rules elements can be selected from a list of valid values displayed in the Rules Options region at the bottom of the window. Rules can also be entered using a combination of these methods.

14.6 Calendar Date Aliases for Admission System Processes

Create date aliases to establish dates within an admission calendar for events such as due dates and offer response dates.

See Chapter 7, "System Wide Services: Calendar" for information on alterable date aliases.

14.6.1 Setting Up Admission Period Calendars IGSAD043

Admission period calendars are user-defined time periods for which you plan to accept applications from diverse types of applicants. Admission periods are structured to match the admission cycles for your institution.

Admission period calendars must be set up to map the available admission category / process category to an admission period. If not defined, then the admission category/process category is not available for a given admission period.

In this window, map admission periods to admission categories and to the process types that are associated to the admission category. Select a program offering option within an admission period and define admission category and process type combinations valid for particular admission periods. Admission periods are created in the Calendar subsystem.

Note: For system admission process types Program Admission Process, Non-Award Studies Admission Process, and Program Transfer Process, program offering patterns can be specified only if their program version has no expiration date entered against it. Programs that are set to expire or not be offered any longer at your institution cannot be applied for by a new student.

Modifying Admission Calendars

The types of admissions that are valid in particular admission periods are restricted by the setup entered in this window.

Enter categories of admission applications that are allowed in an admission period. You must map each category that is applicable for each admission period. For example, you can allow undergraduate applications for a specific admission period and graduate applications for a different admission period.

For each admission period and Admission Process Category, the program offering patterns offered can be restricted to offerings at particular locations, particular attendance modes, and attendance types, or any combination of these. For example, a midyear intake of students can be restricted to offerings of a program at a particular campus.

Note: The program offering options potentially available to an admission period, admission category, and process type combination are linked to the admission category. You can restrict which program offering option is available for a given period by setting up a restriction. This means from all the available program offering options that the admission category is mapped to, you can set up, for example, that in the Spring semester, applicants can only apply for full time status.

CAUTION: Details associated with admission calendars, like those entered in the Admission Period Calendars window, are not rolled over when the Rollover Admission Period concurrent process is performed. Click the **Admission Period Rollover button** to roll these details into new admission periods created by the Calendar Rollover concurrent process. You are responsible for manually updating the information in this window for a new admission period. After rolling forward the information, you must map all of the information against the new admission period that was created by the Admission Calendar Rollover concurrent process.

Prerequisites

Admission categories are set up.

Admission process category details are set up.

Calendar types are set up.

Basic program details are set up.

Program offering options are mapped to admission categories. (They can be restricted on the Admission Period Calendars window.)

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Calendar

Additional Notes and Business Rules

Admission Period Rollover: This button runs the Admission Period Rollover concurrent process.

Admission Process Type: Admission process types are maintained in the Admission Process Category Detail window. If for a given period, not all of the admission process types are available for a given admission category, they can be deleted in this window. For example, you have set up an undergraduate program and undergraduate non-award program. For a given period, if the non-award is not a valid APC to use, then you can delete this from use, using the Admission Period Override window.

Apply Program Offering Option Restrictions: If this check box is selected, then only the restricted program offering patterns are displayed. Deselecting the check box displays all program offering patterns.

Include in Rollover: If you want the restrictions that you have defined for inclusion in the Admission Calendar Rollover process, select this check box. When a

restriction is entered, the check box is automatically selected and must be deselected if not required.

Default: This field is selected when no restrictions are currently entered causes all available program offerings to be defaulted into this region. Delete the restrictions that you do not want to be made available.

Single Response: If selected, then certain admission process categories are to be selected for enforcement of the single response to an admission offer. If you do not want to enforce that an applicant can only accept one offer, then deselect this check box.

Accepted admission offers: When an offer of admission is accepted, Oracle Student System checks to see if the admission process category associated with the application instance is marked as single response. If single response is marked, and if an offer response of **Accepted** is already saved for the person, admission period combination, and all other applications with the admission process category marked as single response, then you receive an error message and the offer response of **Accepted** is not saved.

Rollover: checkbox is marked, then only those records are included in the Admission Period Rollover process.

Rolling Over Admission Calendars

Admission calendars can be rolled over and used in future academic periods. If all admission periods for an academic period are to be rolled over, use the Admission Period Rollover Process concurrent process. This process rolls over all admission periods for an academic period.

The admission process category and program offering option restriction details attached to admission periods are rolled over in this process.

Prerequisites

Calendar types are set up.

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Calendars

Steps

1. Perform the Rollover Calendar Process so that the new admission period instances exist and Oracle Student System can identify the source instances when performing the admission calendar rollover process. The academic year

calendar and all its associated calendars and date alias instances, including admission calendars, are rolled over. The dates defining each calendar instance and related date alias instances are selected in the Rollover Calendar report and adjusted where necessary.

2. Perform the Program Structure Rollover concurrent process so that rolled over admission period program offering option restrictions can be created for the new program offering options.
3. Execute a query in the Admission Period Calendars window to locate each new admission period.
4. When a relevant admission period is displayed, select the **Admission Period Rollover** button. Oracle Student System recognizes which admission period the displayed period was rolled over from and rolls over admission category, process type, and program offering option restriction information from the source period to the new period.
5. Review the Admission Calendar Rollover report to determine if any messages were encountered during the admissions rollover process.
6. Make any required amendments to the rolled over data in the Admission Period Calendars window.

Calendars can be rolled over as far into the future as required. The 2004 calendar structure, for example, must be rolled over into 2005 to allow the 2004 admission period details to be rolled over, but it can also be rolled over into 2006, 2007, and beyond if necessary.

CAUTION: To operate effectively, the admission deferment process requires that calendars be rolled over far enough into the future to enable the admission period, and admission process category apply to the deferred program application, to be entered when the deferment period ends. Otherwise, you cannot defer the applicant to an admission period since none exists. Another solution is to limit deferment to renewable periods of 12 months.

14.6.2 Setting Up Admission Calendar Configuration IGSAD018

Map user-defined admission date aliases to system admission date aliases. For the Admission subsystem to operate, certain critical dates must be specified. You can choose the names for these dates and enter them in the Admissions Calendar Configuration window. The date alias instances, or the actual values, of these admission calendar dates are entered in the Calendar subsystem.

For example, Oracle Student System requires a due date alias, a date when admission applications for an admission period must be received by your institution. Assign a code Appl-Due to this date alias. For Oracle Student System to recognize the system admission date alias Appl-Due, Appl-Due must be entered in the Admissions Calendar Configuration window as the due date alias. **Note:** Date aliases must not be closed.

The Due Date Alias, Final Date Alias, Change of Preference Date Alias, Offer Response Date Alias, Initialize Adm Period Date Alias, Hold Check Date Alias, Program Start Date Alias, Short Admission Start Date Alias fields relate to admission periods. Each of these date aliases must have a system calendar category of admission and instances created in each admission period.

The Summer Comp Period Date Alias, Mid Completion Period Date Alias, End Completion Period Date Alias fields relate to academic periods. Each of these date aliases must have a system calendar category of **Academic** and have instances created in each academic period. These are used to determine whether students complete their program midyear, at the end of the year, or at the end of a summer teaching period.

Calculating an anticipated completion year and period results in a date related to one of the academic period date aliases, whichever one follows the calculated date.

The admission processing tracking item date alias and post admission tracking item date aliases relate to admission tracking items created for an applicant. You can select and enter existing user-defined date alias codes. The inquiry calendar type sets the default Admission period for inquiry instances created without an admission period specified. Date aliases for admission tracking items must have a category of **Admission**.

See Chapter 7, "System Wide Services: Calendar" for more information.

Varying Dates for Admission Period Admission Categories

Dates set up for an admission period admission category can be adjusted without losing the original dates, for example, if an admission application closing date extension applies only to particular locations, attendance modes, or attendance types, with the Admission Period Date Overrides window.

The following system date aliases can be varied:

- Due date aliases
- Final date aliases
- Offer response date aliases

14.6.3 Mapping Admission Calendar Configuration IGSAD018

Map user-defined admission date aliases to system admission date aliases.

Prerequisites

Calendar types are set up.

Date alias instances are set up.

Navigation

Admission > Admission Setup > Setup Calendars > Configure Admission Calendars

Additional Notes and Business Rules

Due Date Alias: Late fees can be charged for applications received after this date.

Change of Preference Date Alias: This date alias is the final date when admission applicants can change their program preferences.

Offer Response Date Alias: This date alias is the final date when applicants must respond. A default offer response date offset can be specified in the Admission Process Category Detail window, or entered as an admission program application's offer response date when an offer is made. If the offer response date comes after the date of the offer response date alias, the latter takes precedence.

Initialize Admission Period Date Alias: This date alias is the date when background processing for an admission period runs. Background processing includes pre-enrolling applications granted deferment in a previous admission period and reactivating applications rejected in a previous admission period where the applicants have requested reconsideration.

Hold Check Date Alias: This date alias is the date when applications are checked for encumbrances

Program Start Date Alias: This date alias is the date when teaching of programs starts. The expected completion date of program attempts is calculated from this date.

Short Admission Start Date Alias: This date alias is the date when short admission process applications can start to be processed. A short admission process can occur only between this and the final date alias.

Summer Comp Period Date Alias: This date alias is the date against which a calculated program completion date is compared.

Mid Completion Period Date Alias: This date alias is the date against which a calculated program completion date .

End Completion Period Date Alias: This date alias is the date against which a calculated program completion date is compared.

Admission Processing Tracking Item Date Alias: This date alias is the date when admission process tracking items are due to be completed for an applicant. The tracking item completion due date for admission processing tracking items defaults to the date specified for the date alias.

Post Admission Tracking Item Date Alias: This date alias is the date when post admission process tracking items are due to be completed for an applicant. The tracking item completion due date for post admission processing tracking items defaults to the date specified for the date alias.

Inquiry Calendar Type: This field derives the term of entrance for an inquiry instance if the term of entrance is not specified when an inquiry is entered.

Academic period date aliases: Academic period date aliases are not related to admission periods.

14.6.4 Setting Up Admission Period Date Overrides IGSAD044

Alter admission date alias instances. The window can be used for the easy extension of admission application closing dates while still retaining a record of the original closing date. The new date is termed the override date.

An override date can be created for all program offerings in an admission period-admission category or for a subset of the program offerings. The Program Offering Pattern window, accessed by clicking **Program Offering Pattern**, acts as a restriction window.

Specifying admission process type, program code, location code, attendance mode, or attendance type restricts the use of the altered date alias instance to program offerings matching the specified parameters. Program offerings that do not match continue to be subject to the original date.

For example, the Calendar Rollover process has created a new admission period with a program application closing date of 01-OCT-2004. You determine that while this date is correct for most programs, off-campus program applications for a particular admission category should close later than other programs, on 20 October. This information is entered in this window.

The Direct Admission process checks the options entered for each program application. When Oracle Student System encounters an application for on-campus

study, it checks for any on-campus override matches for the application's program offering option. None exist, so the application closing date is 01-OCT-2004. When Oracle Student System encounters an application for off-campus study and checks for off-campus override matches for the application's program offering option, it finds the override date, 20-OCT-2004. 20-OCT-2004 is then used as the closing date for that application and is used to determine whether or not the application is late.

Prerequisites

Admission categories are set up.

Admission period calendars are set up.

Calendar types are set up.

Basic program details are set up.

Locations are set up.

Navigation

Admission > Admission Setup > Setup Calendars > Admission Period Date Overrides

Additional Notes and Business Rules

Displaying date aliases: Selecting a date alias, for example, application closing date, displays its original instance for the particular admission period admission category and displays any override instances previously created, for example, at this point the only instance is 01-OCT-2004.

Include in Rollover: If selected, then override information is included when the calendar is rolled over.

14.7 Admission Application Codes

Admission application codes are details used in defining the values for the questions asked on an admission application.

14.7.1 Setting Up Application Detail Codes IGSAD058

Enter codes for each of the classes:

- Sources of applications
- Entry levels and statuses

- Levels of qualification
- Reasons for decision and pending decision
- Rating types
- Special admission category
- Special groups

These codes are used throughout the admission subsystem in self-service, windows, and import processes. These codes are the values that can be entered for questions asked on the admission application

Navigation

Admission > Admission Setup > Setup Application > Application Details Codes

Additional Notes and Business Rules

Code Name: Enter user-defined application detail subclass within given class.

System Default: If selected, the user-defined subclass is taken as system default for the given application detail class.

14.7.2 Setting Up Rating Scales IGSAD059

Define rating scales and their values. Evaluators can use these scales and values to record their assessment of applications.

Navigation

Admission > Admission Setup > Setup Application > Rating Scales

14.7.3 Setting Up Personal Statement Types IGSAD086

Personal Statement Type setup applies to the entire Admissions subsystem. Set up, query, and update multiple personal statements to be used for different application types. Each personal statement represents a single essay question. Mapping a personal statement type to a tracking step code enables users to track the personal statement produced by the applicant.

You can create a tracking step code for a new personal statement type by saving it and clicking **Create/Update Tracking Step**. Clicking **Create/Update Tracking Step** copies the personal statement description in the Tracking Step Catalog window and assigns the personal statement type as the tracking step code. Saving the new tracking step created and closing the Tracking Step Catalog window populates the

tracking step code in the Personal Statement Types window. You must save the record after the tracking step code is populated to attach the tracking step to the personal statement.

A new personal statement type can also be mapped to existing tracking step codes from the list of values in the Personal Statement Types window.

For existing personal statement types, clicking **Create/Update Tracking Step** enables you to change the tracking step code from the list of values in the Tracking Step Catalog window.

You can also set up tracking step codes before setting up personal statement types in the Tracking Step Catalog window in the Tracking subsystem.

Prerequisites

Tracking step catalog is set up.

Navigation

Admission > Admission Setup > Setup Application > Personal Statement Types > Personal Statement Types

14.7.4 Setting Up Applicant Goals IGSAD058

Set up user-defined educational goals and intent types. You can enter information that can be used in recruitment and admission decisions.

Navigation

Admission > Admission Setup > Setup Application > Applicant Goals

Additional Notes and Business Rules

Not functional fields: **System Method** and **System Default** fields are not functional.

14.7.5 Setting Up Credential Ratings IGSAD058

Set up rating values for applicant credentials. Reviewers evaluate the application and credentials of the applicant.

Navigation

Admission > Admission Setup > Setup Application > Credential Ratings > Credential Ratings

Additional Notes and Business Rules

Not functional field: **System Method** field is not functional.

14.7.6 Setting Up Admission Credential Types IGSAD066

You can require applicants to submit their credentials, including portfolios, and letters of recommendation, before considering them for acceptance in a program.

Define admission credential types and map these to system credential types. You can attach tracking steps to user-defined credential types or change attached steps as well.

Prerequisites

Tracking step catalog is set up.

Navigation

Admission > Admission Setup > Setup Application > Admission Credential Types > Admission Credential Types

Additional Notes and Business Rules

Tracking Step Code: Enter the tracking step code used to track credential type.

14.7.7 Setting Up Interests IGSAD058

Set up user-defined special talents and special interests of applicants. This information can be used to determine classes or activities that may be held and influence admission or recruitment decisions.

Navigation

Admission > Admission Setup > Setup Application > Interests

Additional Notes and Business Rules

Not functional fields: **System Method** and **System Default** fields are not functional.

14.7.8 Setting Up Recruitment Information IGSAD058

Set up recruitment information.

Navigation

Student Recruiting > Setup > Recruitment Information

14.7.9 Setting Up Probability Details IGSAD058

Probability types indicate an applicant's probability of applying for a program, the probability of being granted admissions, and the probability of the applicant enrolling.

Probability sources are user-defined and can include the firms that are hired to calculate the probability of an inquiry turning to an application, an applicant receiving an admission offer, and an applicant enrolling.

The Import Probability Values concurrent process can be used to import multiple probability values for a person.

This setup is only required if you want to enter probability details for a person.

Navigation

Admission > Admission Setup > Setup Application > Probability Details

Additional Notes and Business Rules

Not functional fields: **System Method** and **System Default** fields are not functional.

14.7.10 Setting Up School Applying To IGSAD082

If you have multiple schools, you can designate the school within your institution to which the applicant is applying. The school applying to is mapped to an organizational unit.

Prerequisites

Organizational units are set up.

Navigation

Admission > Admission Setup > Setup Application > School Applying To

14.7.11 Setting Up Admission Application Note Types IGSAD067

Enter note types for admission applications.

Navigation

Admission > Admission Setup > Setup Application > Application Note Types > Admission Application Note Types

14.8 Transcripts and Grade Conversion

Set up transcript details and the conversion of the grade information from an outside institution to your internal grading scale.

14.8.1 Setting Up Transcript Information IGSAD058

Enter codes to record transcript details for each of the classes:

- Grading scale types
- Transcript source
- Unit difficulty
- Unit grades

Navigation

Admission > Admission Setup > Setup Application > Transcript Information window

Additional Notes and Business Rules

Not functional fields: **System Method** and **System Default** fields are not functional.

14.8.2 Setting Up Grading Scale Types IGSAD058

Set grading scale types to define the possible grades awarded to students. Examples of grading scales include A, B, C, D, F and 1.0, 2.0, 3.0, 4.0.

You must select the grading scale that you want to implement by setting the IGS: Institution Grading Scale profile option after you have set up grading scale types.

See Appendix B, "Oracle Student System Profile Options" for information about profile options.

Navigation

Admission > Admission Setup > Setup Application > Transcript Information

14.8.3 Setting Up Grade Conversion Details IGSAD068

Set converted values for grades for various grading scales other than the one used by your institution.

Prerequisites

Transcript information is set up.

Navigation

Admission > Admission Setup > Setup Application > Grade Conversion Details > Grade Conversion

Additional Notes and Business Rules

From: Enter the original grade using original grading scale.

To: Enter the equivalent grade after conversion using the new grading scale.

14.9 Application Types and Fee Information

Set up application types and fee information to charge application fees to applicants. To track application fee payment, you must create user-defined admission application fee codes and admission fee statuses. For self-service applicants, you must set up application fees for admission application types and map them to available admission process categories.

If applicants apply through self-service and make credit card payments online, this fee information is updated automatically in the Application Fees window.

You can also establish fee contracts, run predictive fee assessments, and record post-admission enrollment fee details. Student Finance administrators should record this information in the Student Finance subsystem to ensure that the amount is credited to the applicant's account.

To enable the fee contract functionality of the Admission Fees process, you must set up required fee structure in Student Finance.

14.9.1 Setting Up Admission Fee Information IGSAD058

Enter codes for recording fee details against an application for each of the classes:

- Fee payment method
- Fee status

- Fee type

Navigation

Admission > Setup Application > Admission Fee Information

Additional Notes and Business Rules

Default: At least one of the user-defined statuses of a particular system status must be selected as the system default. If you define two statuses and map them to the same system status, at least one of them must be indicated as the system default. For a particular system status, you cannot define more than one status as the system default.

Not functional fields: **System Method** and **System Default** fields are not functional.

14.9.2 Setting Up Admission Fee Statuses IGSAD006

Map user-defined codes for the status of an admission fee to system codes to indicate the current state of the admission application fee for an applicant. Status codes might include Assessed, Exempt, Received, Pending, or Non-Applic.

Navigation

Admission > Admission Setup > Setup Application > Fee Statuses > Admission Fee Status

Additional Notes and Business Rules

Mapping: At least one user-defined value must be mapped to each system value. If more than one user-defined status maps to a single system status, users must define one status as the system default.

Deletion: Default statuses cannot be deleted. There must be one user-defined admission fee category, with the default indicator set mapped to each different system admission fee status.

14.10 Test Results

Set up Oracle Student System to record manually entered test scores and imported electronic test scores.

14.10.1 Setting Up Admission Test Types IGSAD025

Create user-defined admission test types. Possible test types could be Scholastic Aptitude Tests, Test of English as a Foreign Language, Graduate Management Admission Test, and Graduate Record Examination.

Navigation

Admission > Admission Setup > Setup Application > Admission Test Types > Admission Test Types

14.10.2 Setting Up Admission Test Segments IGSAD025

Create various test segments for a test type and set a score range for each. You can also set various other details as mandatory. These details can include the capturing of irregularities, rank, and national scores.

Depending on your business practices, you may require that applicants take admission tests, the results of which are considered while making an admission decision.

Navigation

Admission > Admission Setup > Setup Application > Admission Test Types > Admission Test Types > Test Segments > Test Segments

Additional Notes and Business Rules

Score Min: This field is the minimum value in the score range for a particular test segment. It is used to validate scores entered in Test Result Information window.

Score Max: This field is the maximum value in the score range for a particular test segment. It is used to validate scores entered in Admission Test Results window.

14.10.3 Setting Up Test Result Information IGSAD058

Enter codes for each of the classes:

- Educational level
- Irregularity code
- Test result grade
- Source

Irregularities, for example, can be applicant arriving late for the test, late scores, applicant taking extra time to finish, or postponement of test date.

Navigation

Admission > Admission Setup > Setup Application > Test Result Information

Additional Notes and Business Rules

Not functional fields: **System Method** and **System Default** fields are not functional.

14.10.4 Linking Test Types to Inquiry Status IGSRC006

Link test types to inquiry statuses.

For more information, see Chapter 13, "Inquiry".

14.11 Configure Subsystem

Configure the Admissions subsystem.

14.11.1 Setting Up Form Functions FNDFMFUN

Set up form functions.

See *Oracle Applications System Administrator's Guide* for more information.

14.11.2 Setting Up Menus FNDMMNU

Set up menus.

See *Oracle Applications System Administrator's Guide* for more information.

14.12 Application Types

You can configure multiple application self-service formats. The data fields to display, the order of the data fields, and the instruction text for each application type can be varied as required.

14.12.1 Setting Up System Options IGSFI037

Set up Student Finance system options.

See Chapter 23, "Student Finance" for more information.

14.12.2 Setting Up Application Types IGSAD085

You must define account codes to be used to record the receipt of the application fee.

Configure the application types displayed in self-service. You can select which statements and test types will appear for a given application type in self-service. For example, you might decide to only show SAT and ACT test types for undergraduate application types, even though the full range of test types are defined in Oracle Student System.

You can customize self-service for multiple admissions application formats. For example, you can choose to display some fields for your graduate application and hide the same fields for your undergraduate application.

The Self Service pages window allows users to select which pages will appear for a given application type, and whether the page will be listed as required or incomplete in the checklist for the self-service application.

You can also set up different admission application types and map them to existing APCs. If an application fee is required, then for each application type created, you must define the amount charged for an application fee and attach it to account codes used to record fee receipt.

Note: You must save Oracle General Ledger revenue and cash account codes if the Oracle General Ledger field is set to **Yes** in the System Options window and an application fee amount is entered. If the Oracle General Ledger field is set to **No**, the revenue and cash account codes must be set up and entered in Student Finance.

The rest of the configuration is done using personalization. See *OA Personalization Framework and OA Extensibility Framework* available on [OracleMetaLink](#) for more information.

Prerequisites

Admission process categories are set up.

Personal statement types are set up.

System options are set up. Oracle General Ledger field is set up to indicate if Student Finance will be used.

System options are set up. Manage Accounts field is set up to indicate if Oracle iPayment in self-service will be used.

Navigation

Admission > Admission Setup > Setup Application > Application Types > Application Types

Additional Notes and Business Rules

System Default: Select **Find All** from the View menu. Select the application type to be defaulted from the top region of the window, and click **System Default** from the Application Fee tab at the bottom of the window. If another system default application type exists for the same Admission Process Category, find it and deselect the **System Default** checkbox for the other record before saving your work.

Configurability Function Name: Personalize the functions available on self-service pages. The application type can be mapped to a function and then personalized at the function level so that the admissions application does not ask the same questions for all responsibilities.

Steps for configuring this self-service functionality include:

- Define the functions
- Map the functions to menus in self-service responsibilities
- Select the functions displayed for the specific application type

The list of values displays functions in the back office as well as user-defined functions.

Use in Applicant Self Service: If selected, then this application type is available for applicants in self-serviceself-service.

Oracle General Ledger Revenue Account Code: If Oracle Financials is used and Oracle General Ledger is set to **Yes** in the System Options window in Student Finance, enter your revenue account number. The revenue account is used to record the receipt of checks awaiting realization.

Revenue Account Code: If Oracle General Ledger is not installed, enter the third party revenue account number.

General Ledger Cash Account Code: If Oracle General Ledger is set to **Yes** in the System Options window in Student Finance, enter the institution's cash account number. The cash account is used to record the receipt and withdrawal of cash.

Cash Account Code: If Oracle General Ledger is set to **No** in the System Options window in Student Finance, enter the third party cash account number.

See Also: See *Oracle Applications System Administrator's Guide* for information about functions. See *OA Personalization Framework* and *OA Extensibility Framework* for information about personalizing functions.

14.12.3 Setting Up Application Fees for Application Types

You must define the amount charged as application fee and attach it to account codes used to record fee receipt for each application type created. This setup is required if you want to charge a fee for your online applications. If you do not set up a fee, then the applicant will not have the opportunity to pay the fee in self-service. A fee cannot be established without tying it to the appropriate account codes.

In one stop self-service applications, Oracle Student System looks at the fees associated with an application type to determine if application fees are due for this application. If application fees is not applicable, then you should update the application type fee amounts to null and remove the account related information. This will permit the one stop process to proceed without looking for applications fees.

Prerequisites

Admission process categories are set up.

Personal statement types are set up.

Navigation

Admission > Admission Setup > Setup Application > Application Types > Application Types

14.12.4 Setting Up Self-Service Pages

Deselect pages to be excluded from display in self-service. Pages with the **Required Fields** check box selected cannot be excluded from self-service.

Navigation

Admission > Admission Setup > Setup Application > Application Types > Self Service Pages

Additional Notes and Business Rules

Include: This check box is selected by default to display page named to self-service applicant

Required Fields: If selected, self-service users must save information on the self-service page before the section status for the page can be saved as completed.

14.12.5 Setting Up Self Service Requirements for Personal Statements

Assign personal statement requirements to admission application types for self-service.

Navigation

Admission > Admission Setup > Setup Application > Application Types > Personal Statements > Personal Statement Self Service Requirements

Additional Notes and Business Rules

Group Requirements: This button opens the Group Requirements window. You can set minimum requirements for personal statement groups attached to an admission application type.

Mandatory: If selected, personal statement is a mandatory requirement for admission.

14.12.6 Setting Up Group Requirements

Set minimum requirements for personal statement groups attached to an admission application type.

Navigation

Admission > Admission Setup > Setup Application > Application Types > Personal Statements > Personal Statement Self Service Requirements > Group Requirements > Group Requirements

Additional Notes and Business Rules

Minimum: Enter the number of personal statements required for group.

Self Service Message: Enter a message to be displayed to self-service applicant for group.

14.13 Application for Review

Set up Oracle Student System to be able to review applications by:

- Creating application review profiles and review groups used to sort applications for evaluation
- Creating panels for screening and interviews
- Setting up time and place for interviews
- Creating application outcome statuses
- Creating letters to applicants
- Creating evaluator groups

You must set up evaluators, rating scales, application review profiles, and review groups as preliminary steps of making an admission decision. Then, applications are sorted into application review profiles and assigned review group codes. You then assign evaluators to perform evaluation.

14.13.1 Setting up Application Review Profiles IGSAD089

Set up evaluator person types and rating scales. To sort applications for evaluation, set up application review profiles and for each review profile, set up review groups. You can then run the Assign Evaluators to Application Instances concurrent process to assign evaluators to applications.

To assign application instances for review, first establish the method you wish to use to classify application instances into review groups as well as what methods will be used for conducting review and evaluation. Each application instance can be assigned only one review group code which relates to only one application review profile.

You can specify the following additional parameters or groupings for sorting of application instances in an application review profile before assigning review groups:

- Alphabetical by Surname
- Geographical by Applicant Address
- Geographical by Current Institution Address
- Geographical by Market Code
- Organizational Unit

- Program of Study

Note: Market Codes are defined for Institutions.

Prerequisites

Application detail codes rating type code class is set up.

Rating scales are set up.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile

Additional Notes and Business Rules

Recommendation: For easier maintenance of application review profiles, you should only establish application review profiles that are necessary to conduct reviews and evaluations.

Evaluation Type: This field defaults to Sequential; select Concurrent for random and simultaneous evaluation

Min Evaluator: This field defaults to 1. You can set more than one evaluator for a profile and grouping

Review Group: This button opens the Review Group window for you to define groups for review for the named application review profile.

14.13.1.1 Setting Up Review Groups for a Review Profile

After you have set up the way in which you want to sort applications for review, sort and route the applications to the appropriate evaluators,

Review groups are assigned to application instances through the Assign Review Groups to Application Instances concurrent process.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile

Additional Notes and Business Rules

Include/Exclude: Select **Include** to include the value in the range specified by start and end values; select **Exclude** to exclude the value range from the include range. You can only exclude values from a set of included values.

14.13.1.2 Assigning Evaluators to a Review Group

Define evaluators and decision makers by assigning a person type of **Evaluator** to the person. You can assign evaluators to application instances by running the Assign Evaluators to Application Instances concurrent process or manually in the Ratings window accessed from the Applications window.

Assigning evaluators does not create restrictions as to which evaluator can retrieve a record or update a record with an admissions evaluation or decision.

Note: Assigning evaluators does not set up security roles or restrictions.

Prerequisites

Person types are set up.

Navigation

Admission > Admission Setup > Setup Application > Application Review Profile > Application Review Profile

Additional Notes and Business Rules

Person Number: Number of evaluators must equal stated minimum number and must not exceed stated maximum number. Evaluators must have email address.

Program Approver: This check box is enabled if Program Approval Required is set to **Yes** in the Evaluator window. Select this check box to assign approving authority to any one evaluator.

14.14 Screening and Interview Decision

Set up screening and interview decision information.

14.14.1 Setting Up Interview Data Setup IGSAD058

Set up user-defined possible decisions and map these to system decision types of **Screening**, **Interview**, **Final Screening**, and **Final Interview**.

Navigation

Admission > Admission Setup > Setup Application > Interview Data Setup > Interview Data Setup

Additional Notes and Business Rules

Closing: You can only close a decision that is not currently assigned to any application instance.

14.14.2 Setting Up Lookups

Set up lookups.

Navigation

Setups > Lookups

Additional Notes

Query the types SCREEN_ROLE_TYPE and INTERVIEW_ROLE_TYPE and enter user-defined codes.

14.14.3 Creating an Interview Panel IGSAD100

You can create panels for both the screening or the interview process. A panel consists of a name, a description and panel members. An interview panel differs from a screening panel in that an interview can be conducted as one interview at the panel level or as several interviews conducted by each of the panel members separately.

Navigation

Admission > Admission Setup > Setup Application > Interview Panel > Interview Panel

Additional Notes and Business Rules

Interview panel type: For an interview panel type, you can set the interview at the panel level or at panel member level. If the interview is at the panel level, the applicant will be interviewed once only by the panel as a group. If the interview is set at the panel member level, the applicant will be interviewed by each of the panel members separately.

Null panel level: If the Panel Level is **Null**, the Interview Details window is returned with only information on application instances associated with the panel. No interview details can be recorded for the panel or its members until the Panel Level is populated.

Adding Panel Members

Add members of **Interviewer** person type to a new screening or interview panel and the role that each member has on the panel.

Prerequisites

A panel is created.

Role types are defined in the Panel Members window for person type of **Interviewer**.

Navigation

Admission > Admission Setup > Setup Application > Interview Panel > Interview Panel

14.15 HESA Reference Data

Manually enter information about applicants before they are admitted to a program that is required for reporting to HESA and not captured in Oracle Student System in the HESA Admissions window.

The Maintain Codes window maintains the Oracle Student System reference codes used in the HESA admissions window.

The following table describes the codes that all UK institutions should set up.

Table 14–1 Reference Codes for Admissions

Code	Description
OSS_OCC	OSS Occupation Code
OSS_SOC	OSS Social Class Indicator
OSS_DOM	OSS domicile
OSS_SPEC_STUD	OSS special student marker

See Chapter 27, "HESA" for information about using the Maintain Codes window.

14.16 Import

Set up Oracle Student System to import the following data:

- **Person information for prospective students and applicants:** You can choose to import person and application information instead of manually entering these details. Person information can also be a useful tool for recruitment.
- **Institutions:** Institution information is often available in electronic form, and by importing this information, you do not have to manually enter it.
- **Applications:** Imported from legacy or third party companies that collect applications for institutions and send them tapes
- **Test scores:** Imported from tapes sent to you by the different testing agencies
- **Transcript information:** Imported from electronic transcripts sent to the institution

For more information about Admissions APIs, see *Oracle Student System Open Interfaces Guide*.

14.16.1 Setting Up Source Categories IGSAD055

Source categories are logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. They are also used to build application types and to declare elements as mandatory.

You may want to control how admission data for existing applicants is imported into Oracle Student System. For example, some sources of data may be very accurate and you can decide to always overwrite any existing values in the system.

Source categories are created by default when a source type is created. Source categories are dependent on the system source type associated with the user-defined source type.

Prerequisites

Source types are set up.

Navigation

Admission > Admission Setup > Setup Import Processes > Source Categories

Additional Notes and Business Rules

Setting up: Set up the Include and Mandatory check boxes for source categories in whatever configuration you need. You can choose what categories you want to require third party data to be for the interface tables in order to import the record successfully.

UK Note: For each of the application sources listed in the table include the categories listed selecting the Include and Mandatory check boxes and discrepancy rule as required.

UCAS PER Source Type: **PROSPECT_LIST**

Include:

- Academic History Details, Optional
- Person Details
- Address Details
- Statistics Details
- Person ID Types
- Person Contacts, Optional
- International Details, Optional
- Special Needs, Optional
- Person Residency Details

UCAS APPL Source Type: **APPLICATION**

Include:

- Application Details
- Person Details
- Person ID Types
- Academic History Details, Optional

Admission categories: An admission category is a set of applicants whose applications will be processed through a common set of admission procedure steps.

Fee type: A fee type can be assigned as a fee liability of many fee categories.

Discrepancy rule: If the Include check box is selected, a discrepancy rule must be selected.

14.16.1.1 Setting Up Detail Discrepancy Rules IGSAD055

Define attribute level discrepancy rules. You can assign discrepancy rules only for Person Details source category.

Navigation

Admission > Admission Setup > Setup Import Processes > Source Categories > Detail Discrepancy Rules

14.17 Application Statuses

Set up application statuses to define at which point the application is during the admission process.

14.17.1 Setting Up Application Processing Statuses IGSAD005

Map user-defined application processing statuses to system application processing statuses to indicate the progress of admission application processing.

System statuses are **Received**, **Completed**, **Incomplete**, and **Withdrawn**.

Navigation

Admission > Admission Setup > Setup Application > Application Processing Statuses > Application Processing Statuses

14.17.2 Setting Up Admission Entry Qualification Statuses IGSAD007

Map user-defined admission entry qualification statuses to system admission entry qualification statuses to determine if an application instance can be considered for admission.

System statuses include **Entry Qualifications Not Applicable**, **Not Qualified for Consideration for Offer**, **Qualified for Consideration for Offer**, and **Entry Qualifications yet to be Determined**.

Possible statuses can be **Pending**, **Qualified** or **Not Qualified**.

Navigation

Admission > Admission Setup > Setup Application > Admission Entry Qualification Status > Admission Entry Qualification Status

Additional Notes and Business Rules

Mapping: User-defined codes should be mapped to system codes in a one-to-one relationship. System codes should be used for user-defined codes wherever possible.

System Default: One user-defined admission entry qualification status with the default indicator set must be mapped to each different system admission entry qualification status.

Closing: In order to create a new default value, create the new value before deleting the previous value. A status cannot be closed if it is the default.

14.17.3 Setting Up Admission Unit Outcome Statuses IGSAD008

Map user-defined admission unit outcome status to system admission unit outcome statuses to describe the progress of an applicant's request for admission to a unit.

System admission unit outcome status codes include **Pending**, **Offer**, and **Rejected**.

Navigation

Admission > Admission Setup > Setup Application > Unit Outcome Statuses > Admission Unit Outcome Status

Additional Notes and Business Rules

Deletion: After being used in Oracle Student System, admission unit outcome status codes cannot be deleted. Minor modifications should be made to the codes. Selecting the Closed Check box prevents further use.

14.17.4 Setting Up Application Completion Statuses IGSAD009

Map user-defined application completion statuses to system application completion statuses to indicate if applicants have provided required documentary evidence for the application.

System application completion statuses include **Documentary Evidence Satisfactory**, **Documentary Evidence Rejected**, **Documentary Evidence Not Required**, **Documentary Evidence Incomplete**, **Documentary Evidence Not Yet Assessed**, and **Documentary Evidence Not Satisfactory**.

You must set up admission completion statuses, application offer response statuses, and admission outcome statuses to enable processing of applications.

Navigation

Admission > Admission Setup > Setup Application > Application Completion Statuses > Application Completion Statuses

Additional Notes and Business Rules

System Default: Selecting the **System Default** check box sets the user-defined application completion status as default for an application.

CAUTION: If you enter a null value in this window, you will not be able to process new applications for direct admission.

14.17.5 Setting Up Admissions Outcome Statuses IGSAD010

Map user-defined admission outcome statuses to system admission outcome statuses to indicate the outcome of an application for admission.

System status codes include **Offer**, **Rejected**, **Application Suspended**, and **No-Quota**.

Deletion: After being used in Oracle Student System, admission outcome status codes cannot be deleted. Minor modifications can be made to the codes. Selecting the **Closed** Check box prevents further use.

Navigation

Admission > Admission Setup > Setup Application > Outcome Statuses > Admission Outcome Status

Additional Notes and Business Rules

Deletion: After being used in Oracle Student System, admission outcome status codes cannot be deleted. Minor modifications can be made to the codes. Selecting the **Closed** Check box prevents further use.

14.17.6 Setting Up Admissions Conditional Offer Statuses IGSAD011

Map user-defined admissions conditional offer statuses to system admissions conditional offer statuses to indicate status of an admission for which the admission offer is conditional on satisfying certain requirements. An applicant may be offered admission to your institution based on meeting certain conditions.

The following are the system-defined conditional offer statuses, each of which should have at least one user-defined conditional offer status selected as system default:

- No Conditions Attached To Offer
- Conditional Offer Outstanding
- Conditions Pertaining To Offer Satisfied

- Conditions Pertaining To Offer Not Satisfied
- Conditions Pertaining To Offer Waived

Navigation

Admission > Admission Setup > Setup Application > Conditional Offer Statuses > Admission Conditional Offer Statuses

Additional Notes and Business Rules

Deletion: After being used in Oracle Student System, admission conditional offer status codes cannot be deleted. Minor modifications can be made to the codes. Selecting the **Closed** Check box prevents further use of the admission conditional offer status code.

14.17.7 Setting Up Admission Offer Response Statuses IGSAD012

Map user-defined admission offer response statuses to system admission offer response statuses to indicate the applicant's response to an offer.

System admission offer response statuses include **Offer of Admission Accepted**, **Offer of Admission Rejected**, **Request for Deferred Admission**, **Offer of Admission has Lapsed**, **Response to Offer not Required**, and **Response to Offer Outstanding**.

Navigation

Admission > Admission Setup > Setup Application > Offer Response Statuses > Admission Offer Response Status

Additional Notes and Business Rules

Deletion: After using admission offer response statuses in Oracle Student System, they cannot be deleted. Only minor modifications should be made.

Default: If a system status has more than one user-defined status mapped to it, you must set one of the user-defined statuses as the system default.

14.17.8 Setting Up Admission Offer Deferment Statuses IGSAD013

Map user-defined admission offer deferment statuses to system admission offer deferment statuses to indicate the status of a request for a deferral.

System admission offer response statuses include **Application for Deferred Admission Approved, Confirmed, Deferral of Admission Not Allowed, Application for Deferred Admission Under Consideration, Application for Deferred Admission Rejected, and Application for Deferred Admission Withdrawn by Applicant.**

Navigation

Admission > Admission Setup > Setup Application > Offer Deferment Statuses > Admission Offer Deferment Status

Additional Notes and Business Rules

Deletion: After using admission offer deferment statuses in Oracle Student System, they cannot be deleted. Only minor modifications should be made.

Default: If a system status has more than one user-defined status mapped to it, you must set one of the user-defined statuses as the system default.

14.18 Unit Placement

You can recommend unit placement based on applicants' admission test results on standardized tests such as the Scholastic Aptitude Test (SAT) or Advanced Placement tests for specific subjects. Unit placement recommendations can be based on test types or test segments.

14.18.1 Setting Up Unit Placements IGSAD060

To define unit placement, define a range of test scores at the test type and test segment level. Applicant test scores must be within the range to be considered eligible for placement of specified unit.

Unit placement setup is not required. If you set up this functionality, then recommendation based on test scores can be made.

Prerequisites

Admission test types are set up.

Unit details are set up.

Navigation

Admission > Admission Setup > Setup Application > Unit Placement Details

Additional Notes and Business Rules

Test Types: If this radio button is selected, then you can enter a range of eligibility values for applicant scores at the test type level.

Test Segments: If this radio button is selected, then you can enter a range of eligibility values for applicant scores at the test segment level.

Score: Enter the minimum and maximum values to denote the range that determines placement in given units.

Unit Code: Enter the code of unit to be offered if applicant's scores in admission test is within given range.

14.19 Admissions Profile Options

Set up the following Admissions profile options:

- **IGS: Institution Grading Scale:** Set to indicate the grading scale you want to use.
- **IGS: Pre-enrollment Year:** Set to enable year of program functionality.

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

14.20 Admissions Lookups

Set up lookups.

Navigation

Setups > Lookups

Additional Notes

Query the types IGS_AD_ADM_APPL_RANGE and PE_TENTATIVE_ADM_TYPE and enter user-defined codes.

14.21 Admissions Correspondence

You must notify applicants of the results of their application instances. After creating your letters, run concurrent processes to generate letters to be sent to applicants.

14.22 Admissions Rules

See Setting Up Admission Process Category Detail IGSAD037 for information about admission process categories.

See Chapter 28, "Modifying and Adding Rules" for information about creating rules.

Admission Process Category Rule Example

In this example, the description for the Rule is Application Date Rule.

Rules can be entered manually in the Rule Text tab in the window, or Rules elements can be selected from a list of valid values displayed in the Rules Options region at the bottom of the window. Rules can also be entered using a combination of these methods.

As an example of Rules entry, the steps for creating an Admission Processing Rule that assigns requirements based on application date is below:

1. Click **Admission Processing Rules** on the Admission Process Category Details window. The Admission Process Category Tracking Rules window opens.
2. Click **Add Rule** to create a new rule. The Rule window opens.
3. Enter Application Date Rule rule description.
4. Type IF in the Rule Text tab. Click **Options/Validate**. The word IF is validated as an operand, and the valid elements that can follow it in the rule are presented in the Rules Options region.
5. Click the first record in the Rules Options region, and query *Application%*. The element **Application - Date** is returned.
6. Click the **Add Rule Text** icon to add the **Application - Date** element to the statement in the Rule Text tab.
7. Click **Options/Validate**. Click the **Add Rule Text** icon next to the = element in the Rules Options region.

8. Click at the end of the statement in the Rule Text region. Enter a space and a single quote ('), then click **Options/Validate**. The single quote is validated and the text Add a Valid Date is displayed in the Rules Options region.
9. Enter a date in the format DD/MM/YY, and another single quote. Click **Options/Validate** to ensure that the date is formatted correctly.
10. Click the **Add Rule Text** icon next to the THEN element to add THEN to the statement. Click at the end of the statement in the Rule Text region.
11. Enter a curled parenthesis (()) and click **Options/Validate**. The Rule Options region will display the Tracking Types that have been defined as Admission Processing or Post Admission Tracking Types. If necessary, click **Tracking Type** in the window to create a new Tracking Type.
12. Find or query for the Tracking Type to be used in the Rule. Click **Add Rule Text** icon next to the Tracking Type to add it to the Rule statement. Click at the end of the statement and add a curled parenthesis. Click **Options/Validate**. The Parse Successful message appears. Save the record and close the form.

The Rule statement outlined above would look like this when finished:

IF Application - Date = `20/12/02` THEN {SCLAWRD}

Another example of a Rule, this one based on the Admission Calendar, would look like this:

IF Admission Calendar Alternate Code = ADM SP 04 THEN {FINTRAN}

Other Rules can be based on the program indicated in the application, the value in the Special Group 1 or Special Group 2 field, and other application data. As long as the element is included in the Rules Options list, it can be used in a rule.

14.23 Running the Calendar Quality Exception Report

Run this concurrent process to ensure that you have correctly set up Admissions.

14.24 Rollover Admission Calendars and Categories

Run the Admissions calendar rollover concurrent process to roll over your setup.

15.1 Enrollment Overview

The Enrollment subsystem offers flexible functionality that users can configure as needed.

To set up the Enrollment subsystem, perform the following tasks:

- Configure key date aliases
- Create user-defined and government enrollment related reference data
- Establish an enrollment session, control access to enrollment functions, and set up enrollment procedures
- Set up Pre-enrollment processes to transfer data created in Admissions
- Set up overrides for programs and units created in Program Structure and Planning
- Create enrollment categories to group students for enrollment purposes
- Configure the layout of self-service pages
- Make calendars available for self-service enrollment
- Set up waitlists
- Set up timeslots to assign enrollment time periods

Enrollment is closely integrated with:

- **Admissions:** Enrollment offers are entered and enrollment, fee, and categories assigned
- **Student Finance:** Fees are calculated based on Enrollment program, unit, and fee category data

- **Assessments:** Assessment items are maintained for student program and unit attempts
- **Progression:** Failure to satisfy progression requirements can affect enrollment

Student Program Attempts

A student program attempt refers to the association of a program offering option with a student. Student program attempts are generally created through the admission process. A person record and a program offering option must exist.

A student program attempt includes the following details:

- Funding source
- Fee category
- Exam location
- Student unit attempt

A student program attempt can store additional program attempt information in the Student Program Attempt window, or in windows accessed through the Student Enrollments window.

15.2 Enrollment Profile Options

Set up the following Enrollment profile options:

- **IGS: Unit Section Enrollment Method Types:** Set unit section enrollment method types
- **IGS: Validate Timeslots:** Set to validate timeslots
- **IGS: Display Dropped Unit Sections in the Schedule - Student:** Set to display dropped unit sections in the schedule for student self-service users
- **IGS: Special Permission Required to Update Credit Points and Grades:** Set to indicate if students can update credit points and grading options
- **IGS: Path of File where export data will be stored:** Set path of file where export data will be stored. You can download a text file to the specified directory.
- **IGS: Display Dropped Unit Sections in the Schedule - Admin:** Set to display dropped unit sections in the schedule for administrative users in self-service

- **IGS: Automatically Flag Core/Optional Unit Attempts:** Set to indicate if **Core Indicator** icon is displayed in self-service

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

15.3 Government Contributions

Set up government contributions payment options to record government subsidy information.

15.3.1 Setting Up Government Contribution Payments IGSEN006

Map user-defined government contribution payment options to system contribution payment types that determine the method of calculating contribution liabilities. System contribution payment types are:

- Deferred All or Part of Liability
- Exempt
- Paid Full Liability Upfront With No Discount
- Paid Full Liability Upfront With Discount

This setup is not currently used by Oracle Student System.

Navigation

Enrollments > Setup > Govt Contribution Payments

Additional Notes and Business Rules

Government Contribution Payment Option: Modify a government contribution payment option only to correct an error in the data or to enter changes required by the government. This is possible only if the record has not been used to define a user-defined contribution payment option.

Deletion: If a government contribution payment option is used to define a user-defined contribution payment option, it cannot be deleted. To close a government contribution payment option and prevent further use, select the **Closed** check box.

15.3.2 Setting Up Contribution Payment Options IGSEN007

Enter user-defined contribution payment options and map them to government contribution payment options.

Students in government reportable programs select a program attempt contribution payment option when they enroll.

Prerequisites

Government Contribution Payment types are set up.

Navigation

Enrollments > Setup > Contribution Payments

Additional Notes and Business Rules

Contribution Payment Option: Modify a contribution payment option only to correct an error in the data.

Deletion: If a contribution payment option is assigned to a student program attempt, then it cannot be deleted.

Expire After Academic Period: If this check box is selected, the contribution payment option automatically expires at the end of an academic period. Select this check box if students' continuing eligibility for the exemption is assessed periodically.

15.3.3 Setting Up Enrollment Category Mapping IGSA036

Map enrollment categories to admission categories.

See Chapter 14, "Admissions" for more information.

15.4 Completion Dates

Completion dates indicate when students plan to complete their courses of study.

Oracle Student System supports a nominated and a derived completion date. To use the nominated completion date, create completion periods. These can then be added as a program attempt attribute.

The nominated completion period is used by the Graduation subsystem to select potential graduands.

You can also set up a derived completion date. A user hook is provided in IGSEN022. The completion date is derived based on the user logic you provide.

A completion date is derived whenever the window is opened. The National Student Clearinghouse process can use this date.

You can manually override the derived completion date using the check box provided. If the manual override is provided, it is stored; otherwise, the date is derived on the fly.

The user hook has the following parameters. In/Out indicates the type of parameter.

IN parameters:

- Credit Points Achieved
- ATTENDANCE_TYPE
- Program Code
- ACADEMIC_TERM.LOAD_CAL_ALTERNATE_CODE
- ACADEMIC_TERM.START_DATE
- ACADEMIC_TERM.END_DATE
- Initial term of enrollment
- Person Id
- Load Calendar Type
- Load sequence number

OUT parameters

- Derived Completion Date

15.4.1 Setting Up Nominated Completion Periods IGSEN073

Nominated completion periods are user-defined periods used by the National Clearing House to derive completion dates for all programs in order to determine the anticipated graduation date. Nominated completion periods are also required for the Oracle Student System.

Nominated completion periods cannot be deleted but can be closed.

Navigation

Enrollments > Setup > Nominated Completion Period > Nominated Completion Period

15.5 Notes

Create note types to group similar enrollment notes.

15.5.1 Setting Up Enrollment Note Types IGSEN021

Enter enrollment note types to group enrollment notes according to their purpose, characteristics, or other classification.

Note types created in this window are used in the Maintain Student Program Attempt Notes window.

Navigation

Enrollments > Setup > Enrollment Note Types > Enrollment Note Types

15.6 Enrollment Categories

Enrollment categories define ways of enrolling students.

15.6.1 Setting Up Enrollment Method Types IGSEN015

Enter user-defined enrollment method types to describe ways of enrolling students. These can include self-service or face-to-face enrollment. Modify an enrollment method type to rectify a description error. Enrollment methods that are used to define an enrollment category procedure cannot be deleted.

Navigation

Enrollments > Setup > Enrollment Method Types

Additional Notes and Business Rules

Self Service: If selected, the enrollment method is self-service default.

IVR: Interactive Voice Recognition functionality is not supported for this release.

Pre-Enrollment: If selected, then student has pre-enrolled.

15.6.2 Setting Up Enrollment Category Setup IGSEN010

Enrollment categories are used to classify the methods and procedures used when enrolling students. The Enrollment Category Setup window allows you to govern the behavior of the Student Enrollment window including the buttons and functionality available. The window also allows you to associate Enrollment Categories, Methods, and Student Commencement Types to define how members of each enrollment category are treated.

The validations performed for unit attempt enrollment are based on the validations assigned to these combinations of Enrollment Categories, Methods, and Student Commencement Types.

This window can be used to query and display existing enrollment categories. Enrollment categories are entered and maintained in the Enrollment Categories window.

Enrollment Category Setup

Display and enter enrollment procedure details for the enrollment category displayed in the **Enrollment Category** field. A procedure detail is the combination of an enrollment method type with a student commencement type. Defining a procedure detail permits the steps involved in that procedure to be defined.

Enrollment method types are defined and maintained in the Enrollment Method Types window. Enrollment methods identify the means through which the enrollment is achieved.

System student commencement types are:

- **New:** Enrolling for the first time in a program
- **Continuing:** Re-enrolling, or reconfirming the intention to continue a program
- **All:** Both new and continuing students

For example, an enrollment method type of *Face2face* can have more than one associated enrollment procedure. The combinations *Face2face/New* for new students and *Face2face/Return* for returning students, constitute procedure details. For each procedure detail, the constituent steps can be specified in the Enrollment Category Procedure Step region.

Enrollment Category Procedure Step

Display the enrollment steps for the enrollment category and enrollment procedure displayed in the Enrollment Category field and the Enrollment Category Procedure Detail region.

An enrollment procedure step is a database task carried out during student enrollment. Entering an enrollment procedure involves allocating system step types to a selected procedure detail and placing the steps in order.

Steps are grouped according to the type of enrollment information being dealt with: person, program, or unit steps. The steps are displayed in the Enrollment Category Setup window in these groupings. These groups also determine the steps that appear as navigation buttons or as list items in the Student Enrollments window. For example, steps that belong to the Program group allow users to configure whether or not the Program Change button appears. If the Enrollment Category is not configured to allow the button to appear, the functionality is not available.

International students enrolling in person could have the following enrollment category and step types:

- Enrollment category: **Interntl**
- Enrollment method type: **Face2face**
- Student commencement type: **New**

The Enrollment Category Procedure Step region contains the steps for new international students enrolling in person.

The available enrollment procedure steps are:

- Advanced Standing
- Check Cross-Element Restrictions
- Program Discontinuation
- Check Holds on Person / Program
- Program Examination Location
- Check Person Level Timeslots
- Change to Program Offering Option of a Student Program Attempt
- Check Unit Level Timeslots
- Expected Completion Period
- Program Attempt Holds
- Program Attempt Notes
- Fee Category
- Funding Source

- Intermission of Student Program Attempts
- View/Alter Lapsed Dates
- Pre-Enrollment Details
- Publish Outcomes Indicator
- Research Candidacy Details
- Self Help Indicator
- Special Requirements Details
- Program Transfer
- Program Unit Sets

To set up enrollment procedure details and steps:

1. Enter user-defined enrollment categories in the Enrollment Categories window IGSEN009.
2. Maintain enrollment category procedure details and steps using the Enrollment Category Setup window.
3. Create an enrollment category procedure detail by assigning an enrollment method type and a student commencement type to an enrollment category.
4. Select the required steps for the procedure detail. The steps are assigned an order that determines the order of the corresponding buttons and tabs in the windows accessed from the Student Enrollments window.

Setting Up Enrollment Category Validation Setup

Set up the validation performed during the Unit Enrollment for a student. There are three types of steps that can be set up here:

- **Person:** Validated when you perform any enrollment activity related to the unit attempts or when the student logs into the system.
- **Program:** Validated when you submit the Enrollment Card or drop a unit or update the credit points in self-service.
- **Unit:** Validated when the unit is added to the Enrollment Card or when the Enrollment Card containing pre-enrolled units is submitted.

Note: A validation step must be set up in the Enrollment Category Setup window before it can be overridden.

Final Minimum Credit Step

A special case exists for the Final Minimum Credit step. This step allows you to specify a student's final minimum credit point enrollment. If set up, this step can be configured to display **Warn** or **Deny** every time the student tries to enroll in a unit attempt.

You can set the Final Minimum Credit step to **Warn** and nominate a date alias. Before the date indicated by the date alias value, the student receives messages that the Final Minimum Credit step is violated. On and after the date alias, the student is denied enrollment if the minimum credit requirement is not met.

Alternatively, you can configure the Minimum Credit Point so that it applies only after the student first reaches the minimum credit requirements. In this scenario, the step is set to **Warn** and the **When First Reach Minimum Credit Point** radio button is selected. Before reaching the minimum credit point threshold, the student receives messages. After reaching the threshold, the student is denied any change that would drop them below the minimum credit requirement.

Note: The Minimum Credit Point Configuration tab is not enabled if the Final Minimum Credit validation is not configured as a step.

Final Maximum Credit Point Step

Setting this step enforces the check on the maximum number of credit points in which the student can enroll for the term (load calendar). Setting the step to **Warn** triggers a message, while setting the step to **Deny** prevents enrollment in more than the maximum credit points allowed. The maximum credit points can be set as the **Max Credit per Calendar** in the Basic Program Detail window.

The maximum credit point allowed can be overridden by creating maximum credit point limits for the load calendar (Configure Enrollment Credit Points window), for a person ID group (Person ID Group Enrollment Setup window), or for the individual student as an override (Student Enrollment Overrides window). The student level limit overrides the Person ID group level, which overrides the load calendar level, which overrides the program level.

Progression results can also affect the number of credit points the student can enroll in, although the progression effects are not related to the setup of this validation step in the Enrollment Category.

Forced Attendance Type Step

If set, the Forced Attendance Type validation is also affected by the minimum credit point configuration, since attendance type is based on the number of credit points enrolled.

The Forced Attendance Type step is governed by the setup in the Minimum Credit Point Configuration tab. The Minimum Credit Point Configuration tab must be enabled when the Forced Attendance Type step is set up.

When set to **Every Time**, the Forced Attendance Type step is warned or denied every time as configured in the Validation Steps tab.

When set to **Enforce When First Reach Minimum Credit Point**, the student is warned that they are not meeting the Forced Attendance Type validation until they enroll in sufficient unit attempts to satisfy the Forced Attendance Type. Once the student reaches the Forced Attendance Type, enrollment changes are denied if they would violate the Forced Attendance Type validation.

If set to **Enforce by Date Only**, then a date alias must be supplied. Before the date alias, the student is warned if violating the Forced Attendance Type validation. On and after the date alias, the student is denied violating the Forced Attendance Type validation.

Allow Drop of Core Unit Attempt

This enrollment category validation allows you to indicate if the student can drop the core unit attempts.

If the validation is set to **Warn**, then core unit attempts can be dropped from the student schedule and removed from the Enrollment Cart.

If the validation is set to **Deny**, then the core unit attempts cannot be dropped from the student schedule and cannot be removed from the Enrollment Cart.

If the validation step is not set up, then the validation is not performed.

This functionality uses the Core/Optional indicator in the pattern of study to determine which units/unit sections are core or optional.

When core/optional behavior is turned on using the profile option and units are pre-enrolled or enrolled, they are designated as core or optional if defined in the pattern of study. When the core indicator is selected, the unit is core. When it is not selected, the unit is optional.

When the unit or unit section is not defined in the pattern of study, it is assumed to be elective.

You can override the automatically populated core indicator to **Core**, **Optional**, **Elective**, or **Null** using the Bulk Unit Attempt upload concurrent process.

If the profile option is turned off, the core indicator is not populated.

When defining core/optional units or unit sections in the pattern of study, note that all sections of the unit are treated as core or optional. For example, even if only one unit section is specified in the pattern of study as core, all sections are treated as core.

Search Pattern of Study Units Only

When the Search Pattern of Study Units Only step is configured for an enrollment category, students can only search for the unit sections defined in the pattern of study for the program offering options for the context program attempt.

The Search Pattern of Study Units Only step applies only to students. Self-service administrators can search all unit sections.

In the pattern of study, either a unit or unit section may be defined. Whether a unit or a unit section is defined, all unit sections for the unit are considered part of the pattern of study and are available for the search.

In program-centric mode, Oracle Student System searches for the pattern of study for the context program in which the student is searching. In career-centric mode, Oracle Student System looks for the pattern of study for the primary program in the context career in which the student is searching.

IGS: Pre-enrollment Year profile option:

When the step Search Pattern of Study Units Only is set, Oracle Student System determines the pattern of study in the following way. When the IGS: Pre-enrollment Year profile option is set to **Yes**, Oracle Student System determines which student unit set attempt with the system type of **Pre-enrollment Year** for the teaching period. Set up specific unit sets and map them to the system type of **Pre-Enrollment Year**. This indicates that the unit set attempt represents the Year of Program in which the student is enrolled. This is the year of program unit set attempt. Using the program offering information for the program attempt in addition to the year of program unit set attempt, Oracle Student System determines the pattern of study for the teaching period.

In addition, if the pre-enrollment year unit set is mapped to any unit sets in the Unit Set Mapping window, then the units in the pattern of study for the mapped unit sets are available for searching as well.

When the Pre-Enrollment Year profile is set to **No**, then Oracle Student System determines the pattern of study for the student's program offering option for the teaching period or, if the student has unit set attempts, the pattern of study for the teaching period for the student unit set attempts.

Prerequisites

Enrollment categories are set up.

Enrollment method types are set up.

Navigation

Enrollments > Setup > Categories > Enrollment Category Setup

Additional Notes and Business Rules

Enrollment category: An enrollment category is a way to group students for enrollment purposes. Students in the same category will be treated in the same way by the enrollment process.

Student Commencement Type: Use **New** for students enrolling for the first time in a program. Use **Continuing** for students re-enrolling or continuing in a program. Use **All** for both new and continuing students.

Person Add Allowed: Allows a person to be added using the enrollment forms rather than other subsystems.

Program Add Allowed: Allows a program attempt to be added even if the student does not have an offer of admission in the specific program.

Default Steps: Assigns default steps to the procedure detail. Defaults all steps to Deny.

Enforcement Level: Indicates whether enrollment should be allowed or denied for student who fails validation.

Step Order: Displays the order of the step, which is used to set the order in which the buttons appear in the Student Enrollments window.

Steps: By clicking this button, all validations default in this window. Only enabled if there are no steps set up for the current context.

Every Time: Validation is checked every time the student tries to enroll in a unit attempt in self-service. This is the default.

Enforce When First Reach Minimum CP: Validation is not enforced until the student enrolls in the minimum number of credit points required.

Enforce by Date Only: Validation uses the value of the date alias entered as the date for enforcing the minimum credit point limit. This is a new date alias and must belong to the Calendar Category Load Calendar.

Minimum CP Enforcement Date Alias: Final minimum credit point validation uses the value of the date alias entered as the date for enforcing the minimum credit point limit. This is a new date alias and must belong to the Calendar Category Load Calendar.

Note: Modify an enrollment category only to select or deselect the **Person Add Allowed** or **Program Add Allowed** check box. An enrollment category procedure detail cannot be deleted if any enrollment category procedure steps are associated with it.

Validation step: Allow Drop of Core Unit Attempt is a validation step and is available as a Unit Step in the Enrollment Category Setup window for the Unit step type.

Override: Allow Drop of Core Unit Attempt: Also available as an override in the Enrollment User Override Setup window as a Unit Step override validation for the specified person type. Allow Drop of Core Unit Attempt: Available as an override in the Student Enrollment Overrides windows, where is it a Unit Step Type validation override. A unit or unit section must be specified in the Student Enrollment Override window, if an override is used. If the Enrollment User Override Setup window has an override for the person type enrolling or discontinuing the core unit attempt, then the override is acknowledged.

Behavior: When Allow Drop of Core Unit Attempt is set to **Warn**, the unit attempt can be dropped with a message, when set to **Deny**, the unit attempt cannot be dropped without an override.

Dropping: If a pre-enrolled or unconfirmed core unit attempt exists in the Enrollment cart, then the unit attempt cannot be dropped unless the validation is set to warn or an override is applied either at the student level or based on a person type override.

Drop All functionality: In the self-service Schedule page, the **Drop All** functionality does not apply to core unit sections. If the Allow Drop of Core Unit Attempts is set to **Deny** and the student does not have an override for each core unit attempt and the unit attempts are not being dropped by an administrator with a person level override, then core units cannot be dropped as part of the **Drop All** functionality. If there is only one unit attempt, and it is core, then **Drop All** functionality does not apply, and the unit attempt cannot be dropped without an override.

Purpose: The Enrollment Category Setup window is used to configure the validation steps for self-service and concurrent processes.

15.7 Enrollment in Program Attempts

Set up enrollment in program attempts.

15.7.1 Setting Up Intermission Types IGSEN068

Define intermission types describing why students can interrupt their normal studies. Examples include study at another institution, study abroad and work related.

When an intermission is created, Oracle Student System automatically drops or discontinues all unit attempts where the teaching period census date is overlapped by the intermission period.

Intermission types cannot be deleted but can be closed.

Navigation

Enrollments > Setup > Intermission Types > Intermission Types

Additional Notes and Business Rules

Approval Required: Intermission details cannot be saved without an approver.

Study at Another Institution: Other institution details can be captured in the Intermission window.

15.8 Setting Up Enrollment Timeframes

The following set up is required.

15.8.1 Setting Up Enrollment Calendar Configuration IGSEN016

Define date aliases used in Enrollment. Enrollment calendars provide a framework for the pre-enrollment process. When a student program attempt is pre-enrolled, a student program attempt enrollment record is created and can be viewed in the Program Attempt Administration window.

Enrollment calendars represent your enrollment periods. Each enrollment period must be related to a superior academic period. Enrollment calendars are subordinate to Admissions calendars.

Typically, students are admitted into an enrollment calendar.

Note: Dates must be defined for enrollment and other processes to function.

Navigation

Enrollments > Setup > Configure Enrollment Calendar > Enrollment Calendar Configuration

Steps

1. Enter your enrollment periods using the Calendar Types window.
2. Relate each enrollment calendar to its superior academic calendar using the Calendar Instance Relationships window, accessed from the Calendar Types window.
3. Relate each enrollment calendar to its superior admission period using the Calendar Instance Relationships window.

This step can be performed during admission calendar setup.

4. Define the date aliases for critical enrollment dates using the Enrollment Calendar Configuration window.
5. Using the Calendar Date Alias Instances window, accessed from the Calendar Types window, enter instances of the enrollment date aliases applicable to the calendar instance. You can perform the same task in the Date Alias Instances window, accessed from the Date Aliases window.

Additional Notes and Business Rules

Census: Census dates should be created for teaching and load calendars and is used for validations. For example, when you set up the **Deny All Enrollment Activity** hold, a load calendar census date must be defined for the hold to take effect. This is a mandatory date alias.

Program Completion Cutoff: Used to determine when a program completion is considered as a past program completion.

Start: The default start date in an academic period calendar instance. If a student confirms intention to commence a program before the start date alias instance, the program commencement is defaulted to the date alias instance. If the student confirms intention to commence a program after the commencement date alias, the program commencement defaults to the current date. Only one start date alias can exist in each academic period calendar instance. The default date can be overridden. This is a mandatory date alias.

Start Cutoff: Date alias within a teaching period indicating that a student will no longer be considered. This alias is searched for in the student's first enrolled

teaching period. The census date is used as this date alias. This is a mandatory date alias.

Record Open: Date the recording of unit enrollments opens in a teaching period calendar instance if combined with the Record Cutoff Date Alias. Logical enrollment windows can be constructed.

Record Cutoff: Date the recording of unit enrollments closes in a teaching period calendar instance.

Variation Cutoff: Used to prevent further enrollment variations in a teaching period. Variations include drops and changes to grading schema or credit points. Date alias instances must be specified for each teaching period.

All users: The **Record Open**, **Record Cutoff** and **Variation Cutoff** apply to all users. Use the Enrollment User Override Setup window override these values for users whose person type is mapped to the system type of **Self Service Enrollment User**.

Grading Schema: When defining a date alias for the Grading Schema column, the date alias should be associated with a Teaching Calendar in the Calendar Category column.

Sub unit: This date alias is not used.

Effective Enrollment Start: This date alias represents the point where the processes must consider the related academic period as the current period. For example, for enrollment purposes a date in the October/November timeframe would be the beginning of the following year's cycle making that instance the effective current instance. This is a mandatory date alias.

Load Effective: This date alias is used to determine which is the current load calendar for point-in-time load and attendance type calculations. These processes look for the most recent occurred instance of this date alias and use the load calendar in which it exists as the basis for the derivation of attendance type and load. Instances in calendars other than load have no effect. Only load calendars subordinate to enrollment periods that are linked to the academic period in which a program attempt is enrolled, are considered by these processes. These should not have been linked to the enrollment period. This is a mandatory date alias.

Package Production: This date alias is not used.

Form Due: The default enrollment due date, used only by a process that produces enrollment forms if a specific due date is not specified. This is a mandatory date alias.

Enrolled Rule Cutoff: Represents the last date when unit attempts can be changed from Invalid to Enrolled as a result of passing a previously failed rule.

Invalid Rule Cutoff: Represents the last date on which unit attempts can be switched from Enrolled to Invalid as a result of failing a unit rule check.

Enrollment Cleanup: Indicates when unconfirmed student program attempts within a given enrollment period are cleaned up. The Clean-up Unconfirmed Student Course Attempt concurrent process deletes unconfirmed student program attempts created through pre-enrollment of an admission application in admission periods that are superiors of the specified enrollment period. This is a mandatory date alias.

Lapsed: Represents the last date in an academic period that an Inactive student program attempt is automatically set to Lapsed. The Student Program Attempt Lapse concurrent process lapses the Inactive student program attempts. This is a mandatory date alias.

15.8.2 Setting Up Administrative Unit Statuses IGEN001

Administrative unit statuses map to unit attempt statuses. A unit attempt status defines the activity state of student unit attempts and is system-defined. Administrative unit statuses describe the possible outcomes relating to an activity state for discontinued unit attempt statuses.

Enter user-defined administrative unit statuses that can be assigned when a unit attempt has the status **Dropped** or **Discontinued**. Associating an administrative unit status with a dropped or discontinued student unit attempt is automated through date triggers or unit drop or discontinuation date criteria that determine the appropriate administrative unit status to assign. The relationships between these date triggers and administrative unit statuses are maintained using the Unit Discontinuation Dates window.

You can indicate whether a specific administrative unit status should incur load or not.

For example, a unit attempt status of **Discontin** describes the activity state of a student unit attempt but does not describe the consequences of the discontinuation.

Administrative unit statuses are used to add this detail to the event by subdividing the status for **Discontin** as shown in the following table:

Table 15–1 Administrative Unit Status Example

Administrative Unit Status	Description	Unit Attempt Status
Wd-early	Withdrawn Early	Discontin

Table 15–1 (Cont.) Administrative Unit Status Example

Administrative Unit Status	Description	Unit Attempt Status
Wd-late	Withdrawn Late With No Penalty	Discontin
Wd-fail	Withdrawn Late With Penalty	Discontin

Administrative Unit Status Grade

A grade can be associated with an administrative unit status whose corresponding unit attempt status is **Discontin** to enable automatic application of an appropriate grade to a discontinued student unit attempt.

For example, an administrative unit status of **Wd-Fail** can result in a failing grade. When this grade is entered against the administrative unit status, the failing grade is reported for student unit attempts from which a student has withdrawn after the specified cutoff date is reported in official notifications.

You can close but cannot delete administrative unit statuses.

Prerequisites

Grading schema codes are set up.

Navigation

Enrollments > Setup > Administrative Unit Statuses > Administrative Unit Statuses

Additional Notes and Business Rules

Show on Official Notification: If selected, then status is included on official notifications.

Effectively Enrolled For Progression: If selected, then discontinued units with this administrative unit status are included in program progression checks and grade point average calculations. If deselected, the unit is treated as not being enrolled. By default, the Effectively Enrolled for Progression check box is selected.

Effective Lapsed Time for Progression: If selected, the discontinued units with this administrative unit status are counted as an effective enrollment period for progression time elapsed calculations. If deselected, the unit is not counted for elapsed time calculations. By default, the Effective Lapsed Time for Progression check box is selected.

Grading Schema Code: Only one grade from the current grading schema can be added. A grade cannot be modified once it has been saved. To make changes, delete the grade and enter a new one. Do this only to correct errors in the data. Delete a grade only if the grade was incorrectly assigned and has not been used elsewhere.

Version: System-generated field that identifies a version of the grading schema.

Grade: Indicates student’s level of achievement in a unit attempt.

15.8.3 Setting Up Unit Discontinuation Date Criteria IGSEN008

Unit Discontinuation Dates are created to indicate when an administrative unit status applies.

Unit attempts dropped or discontinued on or after the date indicated have the associated administrative unit status applied to them. If there is a grade associated with the administrative unit status, it is applied for the unit attempt as well.

Discontinuation date aliases for student unit attempts within each teaching period are set up in the Calendar subsystem. They must be linked to a **Drop** check box or to an administrative unit status to manage unit discontinuation.

Example

Date aliases early in the teaching period usually have the **Drop** check box selected. Later date aliases may be linked to an administrative unit status such as **Wd-Late** or **Wd-Fail**.

Early in the enrollment time frame, the student is allowed to drop classes without penalty. During this time, the unit attempt is typically identified as a drop. As the teaching period progresses, student can incur administrative or academic penalties for withdrawing from a class. These penalties are applied using the grades associated with the administrative unit statuses.

The following table describes possible linkages using the Unit Discontinuation Dates window.

Table 15–2 Data Alias Link Example

Date Alias	Description	Administrative Unit Status	Drop
Unit-drop	Withdrawn unit dropped	None	Yes
Wdn-early	Early unit withdrawal	Wd-early	No

Table 15–2 (Cont.) Data Alias Link Example

Date Alias	Description	Administrative Unit Status	Drop
Wdn-late	Late unit withdrawal without fail grade	Wd-late	No
Wdn-fail	Late unit withdrawal > fail	Wd-fail	No

The following table describes potential effects when a student's unit attempt is discontinued in a specific teaching period.

Table 15–3 Effect of Data Alias Link

Discontinuation Date of Unit Attempt	Instance of Date Alias in Semester 1, 2004	Effect	Explanation
28/FEB/2002	Unit-drop 1/JAN/2005	Unit attempt dropped	1/JAN/2005 is the most recent instance of a date alias before 28/FEB/2005. The Drop check box has been set for Unit-drop, so any unit attempts that are discontinued between 1/JAN/2005 and 1/MAR/2005 inclusive are saved with status Dropped .
6/MAR/2002 16/MAR/2002 30/MAR/2002	Wdn-early 2/MAR/2005	Wd-early entered against these three unit attempts	The administrative unit status Wd-early is in effect for all dates from the date alias instance of Wdn-early until Wdn-late becomes effective on 31/MAR/2005. Therefore, actions associated with Wd-early apply to unit attempts discontinued in this period.
31/MAR/2002	Wdn-late 31/MAR/2005	Wd-late entered against unit attempt	The unit has been discontinued as of the day on which Wdn-late falls and receives the administrative unit status Wd-late.

Table 15–3 (Cont.) Effect of Data Alias Link

Discontinuation Date of Unit Attempt	Instance of Date Alias in Semester 1, 2004	Effect	Explanation
9/JUN/2002	Wdn-fail 8/JUN/2005	Wd-fail status entered against the unit attempt with an associated fail grade	Grades must be associated with all discontinuation administrative unit statuses.

Prerequisites

Date aliases are set up.

Administrative unit statuses are set up.

Navigation

Enrollments > Setup > Unit Discontinuation Dates > Unit Discontinuation Dates

Additional Notes and Business Rules

Changes: Modify a unit discontinuation date criteria record only if needed to correct an error in the data. After a unit discontinuation date criteria record is used, changing or deleting alters the interpretation of information in student records.

Drop: If selected for this date alias, then the student unit attempt is saved with the status of **Dropped**.

Discontinue: If deselected for this date alias, then the administrative unit status linked with this date alias is automatically entered against the unit attempt and triggers specific processing, for example, whether load is incurred, or whether the attempt appears on official notifications. This processing is specified in the Load Calendar Structure window and the Administrative Unit Statuses window. There is one exception. The automatic entry of administrative unit statuses depends on linkages marked as defaults. Different date aliases can be assigned instances with the same date. It is therefore possible that more than one administrative unit status is linked to a particular date. In this situation, and if no default is set, you must select between possible statuses when discontinuing the unit attempt in the Student Enrollments window. If one of the linkages is specified as the default, it is applied automatically, but can be overridden.

Administrative Unit Status: Enter user-defined administrative statuses applicable to a discontinued student unit attempt. This field is used to determine load, progression, and grades.

15.8.4 Setting Up Discontinuation Reason Codes IGSEN017

Enter reasons for unit and program discontinuation that will be used in the Student Enrollments window and in self-service.

Discontinuation reason codes are applied when a student program or unit level enrollment is terminated before completion. Discontinuation reasons may be voluntary or system-initiated.

- **Voluntary discontinuation:** Reasons for voluntarily discontinuing a program or unit attempt. Specify required reasons and set one as the default.
- **System-initiated discontinuation:** Reasons a student program attempt has been discontinued as part of a system process.

You must define one **Transfer** and one **Progress** discontinuation type as defaults. These are used when discontinuation occurs as the result of a transfer or a progression outcome.

Other discontinuation reasons can be mapped to these system reasons.

- **Terminated:** No system functionality
- **Transfer:** Relate to the program transfer process
- **Progress:** Relate to progression outcome

You cannot delete, but must close discontinuation reasons you do not want to use.

Navigation

Enrollments > Setup > Discontinuation Reasons > Discontinuation Reasons

Additional Notes and Business Rules

UK: Define discontinuation reasons that are mapped to the HESA reason for leaving codes.

Transfer reason: At least one user-defined transfer reason must be entered in the Discontinuation Reasons window, and more can be specified. Only one reason can be indicated as the system default. This default is automatically inserted whenever a program is discontinued as part of the transfer process, but the value can be

amended in the Student Enrollments window if another transfer reason is more appropriate.

Discontinuation Reasons Code: If a discontinuation reason code is used in a student enrollment, it cannot be deleted.

Default: If selected, the default for a voluntary discontinuation reason.

System Default: If selected, then the system discontinuation reason type is assigned. One record must be selected as the default for each set of system discontinuation reason types.

15.9 Enrollment Unit Load

You must associate teaching calendars with the load calendars so that Oracle Student System can correctly determine student load for the load calendar. **Term** and **load** are used interchangeably throughout Enrollment when referring to the load calendar.

15.9.1 Maintaining Load Calendar Structure IGSEN019

Create the required association between the load and teaching calendars. This relationship allows Oracle Student System to derive the attendance type and to calculate the student load in credit points for the term.

Default Load Apportionment

The relationship between load and teaching calendars is a little unusual, in that it is not defined within the standard Calendar Relationships window. Instead, it is maintained in a separate Enrollment window as the default load apportionment. Through this window, teaching calendar types can be associated with load calendar instances, and the proportion of the credit load specified (for example, a teaching period which spans multiple terms may be split 50/50 across these terms).

For the load calendar selected in the Load Calendar Structure window, the links to teaching calendars can be entered and maintained in the Default Load Apportionment region. The default proportion of the load contributed to the load calendar is also entered in this region. Study units corresponding to the teaching calendars have the load apportioned to these defaults unless the load ratios have been specified individually in the Unit Load Apportionment region.

When apportioning load, the following rules apply:

- If the teaching load is split across two or more load calendar instances, the percentages entered against the load calendars should total 100% for a single cycle of the teaching period.
- Load can be spread evenly or unevenly across load calendars. When the split is uneven, different percentages can be added for load calendars that fall within one or two academic calendar periods, but not more.
- If the teaching period spans two academic calendars, the Second Percentage field is used to distribute teaching period loads across the second academic calendar period.

Note: A teaching period that spans two academic calendars indicates straddle teaching periods starting in one year and ending in the next year.

- For straddle teaching periods, a value of zero should be entered against the load calendars corresponding to the segments outside the teaching period span. Yr-Long-2 is an example of this.
- Changing a load apportionment can have far-reaching consequences. It affects load and derived fee calculations, and potentially the derived program attendance type, for all students enrolled in the unit version that links to the load calendar and teaching calendar concerned. You will see a message whenever a modification is attempted.
- Users typically delete a record while initially setting up the structure only to correct an error. Subsequent alterations to the unit version load apportionment have potential repercussions elsewhere in the system.

Default Load Apportionment Example 1

Each calendar selected in the header region of the Load Calendar Structure window has one or more teaching calendar records associated with it in the Default Load Apportionment region.

Example 1 uses the following teaching calendar types:

- Sem-1 is a one semester teaching period.
- Yr-Long is a teaching period of a year's duration, within one year.
- S1-E1 is a teaching period that spans three semesters, starting in semester one of one year and ending at the end of semester one in the next year.
- Yr-Long-2 is of a year's duration, starting in semester two of one year and ending at the end of semester one of the next year.

For the teaching calendar S1-E1, the load is represented as being unevenly split across three load calendars in the proportion 30% > 45% > 25%. The Second Percentage field holds the percentage for the third portion of the teaching period, which is calculated against the load calendar Ld-Cal1 in the next academic period.

Administrative Unit Status Load

Discontinued student unit attempts have an administrative unit status entered at the time of discontinuation. These statuses indicate how far the student progressed before discontinuing.

To calculate the load correctly for these students, the Load Incurred Check box in the Administrative Unit Status Load region is associated with each of the statuses to show whether the unit attempt does or does not incur load. For maximum flexibility, the Load Incurred Check box can be selected for each load calendar instance and teaching calendar combination.

Unit Load Apportionment

Individual unit versions can have load apportioned differently from the default load apportionment setup for their corresponding teaching calendars.

For a selected load calendar instance and teaching calendar combination, the load an individual unit contributes to the load calendar can be entered and displayed in the Unit Load Apportionment region. This region is accessed as an overlay region using the **Unit Load Apportion** button.

When apportioning load, the following rules apply:

- If the teaching calendar load is split across two or more load calendars, the percentages entered against the load calendars should total 100% for a single cycle of the unit version.
- Load can be spread evenly or unevenly across load calendars. When the split is uneven, different percentages can be added for load calendars that fall within one or two academic calendar periods, but not more.
- If the unit version spans two calendars, the Second Percentage field is used to distribute the unit version load across the second academic calendar period.

Note: A unit version that spans two academic calendars indicates straddle units starting in one year and ending in the next year.

- For straddle units, a value of zero must be entered against the load calendars corresponding to the segments outside the teaching period span.

Load Calendar Structure

The system contains a number of calendar categories, one of which is LOAD. Calendars in this category specify the periods of time for which student load is calculated and are used to perform the following tasks:

- Determining Effective Full Time Student Units, or EFTSU, at any point in time
- Determining a student attendance type at any point in time
- Calculating fees
- Reporting student load to the government on government census dates

A load calendar belongs to only one academic calendar, and typically each load calendar spans only one government census date. Teaching calendars and study units, however, can span one or more load calendars.

Calculating Load

A student's load on a particular date within an instance can be anticipated or determined at any time during and after the instance. Load predictions can be calculated for future load periods as soon as the calendar structures are in place and students have enrolled.

Apportioning Load

Study units represent a certain number of credit points or EFTSU, towards a student's load, as specified in the Basic Unit Details window, in the Program Structure and Planning subsystem. For units with teaching periods that span more than one load period, however, the load the unit represents must be divided across the load periods. In the previous figure, load is distributed evenly between two load periods for YR-LONG, and between three load periods for S1-E1.

However, load for a teaching period can also be distributed unevenly across the span of no more than two academic calendars. In the previous figure, for YR-LONG, load can be split between LD-CAL1 and LD-CAL2 in proportions totalling 100 percent. Similarly for S1-E1, load can be split across LD-CAL1 (98), LD-CAL2 (02), and LD-CAL1 (03) in any desired proportion. The distribution of teaching calendar load between load periods is entered in the Load Calendar Structure window.

This load apportionment applies to all enrolled and completed student unit attempts. For students who have discontinued a unit attempt, the system determines whether or not they should incur load in a particular load period by the application of rules.

Load and Discontinued Unit Attempts

Administrative unit statuses also carry implications for load, and must be considered in relation to teaching periods of different lengths.

If required, different sets of administrative unit statuses can be applied to different teaching calendars. When a student discontinues a unit attempt, the system finds the most recent discontinuation date alias instance in that teaching calendar before the student's discontinuation date. The discontinuation date aliases are matched to administrative unit statuses except when the unit attempt is deleted, typically in the case of a very early withdrawal.

Setting Up Mechanisms to Handle Load

To handle load for discontinued unit set an indicator for each administrative unit status to show whether it carries load, in the Load Calendar Structure window.

When student load is reported to the government, such as at census dates, each census date in a teaching period must coincide with an instance of the date alias, matching the administrative unit status in effect at the time. The instance of the date alias can be the same for each census date. In the following figure, for example, the second census date for YR-LONG, and the second and third census dates for S1-E1, should all coincide with an instance of the date alias WDN-LATE.

Logic to Determine Contribution to Load

After the load mechanism is set up, the following logic determines whether a discontinued unit attempt contributes to a student's load in any load period:

1. From the date given for discontinuing the unit, the system retrieves the last discontinuation date alias instance in the teaching period of the study unit.
2. If this date alias instance occurs before the start of the relevant load period, load is not incurred.
3. If this date alias instance occurs after the end of the relevant load period, load is always incurred.
4. If the date alias instance occurs within the relevant load period, the student's Administrative Unit Status indicator determines whether load is incurred.

When load is incurred, it is added in the proportion already specified as the teaching period's contribution to the particular load period.

Load and Attendance Types

A direct relationship exists between the load incurred by students and their attendance type. Students enroll in a program offering option that belongs to a particular attendance type. Then they enroll in units that are each assigned a specified amount of load. The system calculates a student's load for the following purposes:

- To report an attendance type for each student to the government

The attendance type is determined by comparing the student's calculated load to the load ranges defining attendance types for the academic period.

For a particular reporting period, load is calculated for all of a student's program attempts across all relevant teaching periods using the relevant load apportionment factors.

- To determine the program attendance type for a particular load period for comparison with the student's enrolled program attempt attendance type, or for administrative purposes related to attendance type, such as internal fees and library borrowing privileges

The system validates that the total load for all load incurring units in which the student enrolls is within the acceptable load range for the attendance type of the program attempt.

The attendance type is determined by comparing the student's calculated load for a program attempt to the load ranges defining attendance type for a particular load calendar period.

For example, a student enrolls in a full-time program with an acceptable load range of $0.750 > 2.000$ EFTSU. The student elects units with a total load of 0.750 EFTSU in the current academic period and year and is reported to the government as a full-time student.

A student can enroll in units totaling 0.250 EFTSU in semester 1 and 0.500 EFTSU in semester 2. The acceptable load range for full-time enrollment in the two corresponding load calendars is $0.375 > 1.000$ while the part-time load range is $0.001 > 0.374$. The institution uses a full or part-time attendance type to determine a service fee. The student's load for the first semester falls within the part-time service fee rate while the load for the second semester requires the full-time service fee rate.

Prerequisites

Calendars are set up.

Administrative unit statuses are set up.

Basic unit details are set up.

Navigation

Enrollments > Setup > Load Calendar Structure > Load Calendar Structure

Additional Notes and Business Rules

Calendar Type: User-defined name given to all calendars of a similar classification. Each calendar type must be assigned a calendar category for the system to determine the calendar type functionality.

Percentage: Enter the percentage of load attributed to the related calendar type.

Second Percentage: If a teaching calendar is related to more than one load calendar, the second percentage is used to indicate how much of the load belongs to the second calendar.

Load Incurred: If selected, then load is incurred for a student attempt with the related administrative unit status. Even if the unit attempt is discontinued, when this check box is selected, the student has incurred the credit points associated with the unit attempt.

Version Number: A system-generated number that identifies the unit version.

15.9.2 Setting Up Government Snapshot Control IGSST018

Set up government snapshot control.

See Chapter 14, "Admissions" for more information.

15.10 Credit Point Overrides

A program can be set up to have a maximum and minimum credit point limit for each load calendar. Where you do not want the same limits to apply to all students enrolled in the program, you can override the credit point limits.

15.10.1 Configuring Enrollment Credit Points IGSSEN075

You can override the maximum and minimum credit points for the program by associating maximum and minimum credit points with a calendar type.

If you include the **Final Maximum Credit** and **Final Minimum Credit** validation steps in the enrollment category process, then Oracle Student System first checks to see if the maximum and minimum credit points are overridden. If they are not, the

application then checks for the maximum and minimum credit points defaults for the current load calendar.

Set the maximum and minimum credit points for the program in the Basic Program Details window. This configuration is used for the validations unless overridden elsewhere.

The program maximum and minimum credit points can be overridden by a personal enrollment eligibility override, by a maximum or minimum limit set for a person ID group, or by a term.

Note that some progression outcomes involve the placing of holds that effect the number of credit points in which a student can enroll.

Prerequisites

Basic program details are set up.

Calendars are set up.

Navigation

Enrollments > Setup > Configure Enrollment Credit Points

Additional Notes and Business Rules

Calendar Type: Displays all active load calendars with a system category of **Load**.

15.10.2 Setting Up Person ID Group Enrollment Setup IGSEN077

You can specify how enrollment validations perform for a specific group of students. Using a Person ID Group allows you to define a more specific set of students than are defined by an enrollment category.

You can also override the minimum and maximum credit points for a specific Person ID Group.

Prerequisites

Person ID group definitions are set up.

Navigation

Enrollments > Setup > Person ID Group Enrollment Setup

Additional Notes and Business Rules

Show: Displays a group of validations.

Step Meaning: Enter the validation to be applied to the person ID group.

Notification: Indicates whether validation is set to **Warn** or **Deny**. If set to **Warn**, then enrollment is allowed even if student breaches validation. If set to **Deny**, then enrollment is not allowed if student breaches the validation.

15.11 Repeat Processing

Oracle Student System draws a distinction between repeating and re-enrolling in a unit attempt. A repeat is a unit that is re-taken in an attempt to get a better grade. A re-enrollment is a unit that is taken again for the purpose of getting more credit.

Re-enrollment processing supports the concept of Multiple Unit Sections (MUS), or enrolling in sections of the same unit in the same teaching period.

To support Multiple Unit Sections, the set up must be completed in Program Structure and Planning. When a unit is set up as a multiple unit section, and the individual unit attempt is set up as participating in multiple unit sections, then students can enroll in any unit sections up to the limit defined.

If a particular unit section is designated as not participating in multiple unit sections, then you are allowed to enroll in only one unit section.

For example, if a unit that supports multiple unit sections has five unit sections, and one is marked as not a multiple unit section, then the student can either enroll only in the one section not participating in MUS, or can enroll in one or more of the other sections, up to the limit defined.

To enforce repeat and reenrollment limits, you must set up the Unit Repeat and/or Unit Re-enrollment steps in the enrollment category, as desired.

15.11.1 Setting Up Repeat Process Configuration IGSPS069

Repeat rules are required to set up Oracle Student System and can be modified at the organization level and inherited and modified at the unit level. They influence the grading process which analyses the previously earned grades and advanced standing units in the repeat process, and calculates grades.

You define the maximum number of repeats at the organizational level or if the **Reenroll for Credit** check box is not selected, at the unit level.

In addition, you can set up repeat families. Each unit in the repeat family is considered a repeat of all the other units in the family. For example, if a family contains the units BIOL201, PALEO203, and ANTHRO205 and the maximum number of repeats allowed is one, then the student could either take BIOL201 twice, or take BIOL201, then PALEO203. At this point, the student could not re-enroll in any other units in the family.

When determining the grading results, you have the opportunity to use an external formula.

External Formula

The following is information on the user hook available when an external formula is used:

```
Package Dummy Function :   IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS
Following is the dummy function call and dummy function. Please check...
Main Package : IGS_AS_FINALIZE_GRADE.finalize_process
Following is the Code , calling Dummy Function (
IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS )
```

```
*****
-- Repeat Processing
-- If External Formula is set call Repeat Processing User Hook and exit
IF v_external_formula = 'Y' AND
   NVL(v_repeatable_ind, 'Y') = 'N' THEN
IGS_AS_USER_REPEAT.USER_REPEAT_PROCESS(v_suao_rec.person_id,
   v_suao_rec.course_cd,
   v_suao_rec.unit_cd,
   v_suao_rec.cal_type,
   v_suao_rec.ci_sequence_number,
   v_suao_rec.outcome_dt,
   v_suao_rec.grading_schema_cd,
   v_suao_rec.version_number,
   v_suao_rec.grade);
*****
```

Following is that Dummy Package & Function

```
PACKAGE BODY IGS_AS_USER_REPEAT AS
/* $Header: IGSAS46B.pls 115.0 2002/03/06 19:22:04 pkM ship    $ */
PROCEDURE user_repeat_process ( p_person_id   IN NUMBER,
                               p_course_cd    IN VARCHAR2,
                               p_unit_cd      IN VARCHAR2,
                               p_teach_cal_type IN VARCHAR2,
                               p_teach_ci_sequence_number IN NUMBER,
                               p_outcome_dt   IN DATE,
                               p_grading_schema_cd IN VARCHAR2,
```

```
p_version_number IN NUMBER,
p_grade IN VARCHAR2)
IS
BEGIN -- user_repeat_processS
  -- User Hook procedure to allow users to use their own logic for repeat
processing.
  -- If there is no Institution specific repeat processing this procedure should
remain empty
  RETURN;
END user_repeat_process;
END IGS_AS_USER_REPEAT;
Control goes to this function and RETURN (Exit), with doing any processing. So,
the user can put their Logic in this Function.
```

Prerequisites

Organization units are set up.

Institution are set up.

Navigation

Enrollment > Setup > Repeat Processing

Additional Notes and Business Rules

Include Advanced Standing Units: If selected, then advanced standing units are included in the repeat process.

Maximum Repeats for Funding: Indicates maximum repeats for funding. This field is designed for internal reporting use and has no integration with Financial Aid or Student Finance.

Grading Results:

- **Use Most Recent Unit Attempt:** The most recent grade or mark is displayed on the transcript. Other marks or grades are displayed as defined in the grading schema.
- **Use Best Grade Attempt:** The best grade from all the unit attempts is used for the transcript. If the same grade is earned, then the most recent grade attempt is displayed. The other grades are displayed as defined in the grading schema.
- **External Formula:** User hook (API) is provided to do repeat validation in external processing outside Oracle Student System and return appropriate grades to Oracle Student System.

Unit level: If repeat processing information is also set up at the unit level, then limits set at the unit level override those set at the organizational unit level.

Advanced Standing: When selected, if the student has granted or approved advanced standing for a unit, that advanced standing is counted as part of the repeat conditions. If the check box is not selected, then advanced standing is not counted as part of the repeat conditions.

Student unit attempts: A student unit attempt counts toward repeat limits if it has the status of **Enrolled**, **Discontinued**, **Completed**, or **Duplicate**. All student unit attempts for units grouped in repeat families count toward the repeat limits. If student has reached the maximum number of repeats allowed for any member of a family group, the student is denied enrollment in any units in the family.

15.11.2 Setting Up Unit Repeat Families IGSPS107

Create unit repeat families and associate units to the family. Units attached to a repeat family can be repeated and allotted credit.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Unit > Unit Repeat Families

Additional Notes and Business Rules

Units: Each unit belonging to a repeat family is associated with a repeat code. Each unit can only belong to one unit repeat family.

15.11.3 Setting Up Unit Repeat and Unit Re-enroll Conditions IGSPS078

Enter details to control the conditions under which a student can repeat or re-enroll in a previous unit attempt.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Basic Unit Details

Additional Notes and Business Rules

Maximum Allowed: If null, there is no limit to the number of repeats allowed.

Unit Status: Unit statuses include Active, Inactive, and Planned. You cannot enter repeat conditions for inactive units.

Unit Version: To modify a unit version with enrolled students, you must create a new unit version.

Exclude from Multiple Unit Section: Indicates that the unit section is not a multiple unit section.

PSP Legacy API: All Changes to the Unit Repeat/Reenroll Condition Unit Section Repeat/Reenroll Condition windows must be included in the PSP Legacy API.

The Exclude from Multiple Unit Section: This value can be made null in the Legacy API. The default is N.

Repeatable value: The initial repeatable_ind value is N.

Null values: Null values are considered infinite.

Radio button updates: You can update radio buttons after you enter information. When you update a radio button, the data is removed from the appropriate tab.

Multiple Unit Section Allowed: If selected, and you enter data into the **Same Teaching Period Credit Points** and **Same Teaching Period Allowed** fields, but later deselect the **Multiple Unit Section Allowed** checkbox, the data in the **Same Teaching Period Credit Points** and **Same Teaching Period Allowed** fields is removed.

15.11.4 Setting Up Unit Section Repeat Conditions IGSPS089

Repeat conditions indicate conditions under which a unit section may be repeated. These conditions include allowability in the same or other teaching period, maximum number of repeats, maximum repeat credit points, and maximum repeats eligible for funding.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Repeat Conditions > Unit Section Repeat Conditions

Additional Notes and Business Rules

Re-enroll for Credit Allowed: If selected, then student is allowed to re-enroll for credit.

Same Teaching Period: If selected, then student is re-enrolling for the same teaching period.

15.12 Reserved Seating

Reserved seating allows you to save seats in unit sections for specific groups of students. All or part of the seats may be reserved. For example, 100% of the seats in a nursing class may be reserved for nursing students, while 50% of seats in an English class are reserved for English majors.

15.12.1 Setting Up Organizational Unit Reserved Seating IGSPS105

Define priorities and preferences to reserve seats at the organization unit level.

Prerequisites

Organizational units are set up.

Navigation

Enrollments > Setup > Organizational Unit Reserved Seating

Additional Notes and Business Rules

Percentage field: Must be less than or equal to 100%.

Preference Value field: For any given priority, at least one preference value must be selected.

15.12.2 Setting Up Unit Offering Pattern Reserved Seating IGSPS106

Define priorities and preferences with percentages to reserve seats at the unit offering pattern level.

Navigation

Program Structure and Planning > Basic Unit Details > Unit Offering > Unit Offering Pattern Reserved Seating

Additional Notes and Business Rules

Percentage field: Must be less than or equal to 100%.

Override Value: Click the **Override Value** button to enter data in fields populated by inherited data.

15.12.3 Enrollment Limits, Waitlist, and Reserved Seating IGSPS085

Specify the priority and preference for reserved seating and the preference value percentage.

Prerequisites

Locations are set up.

Unit classes are set up.

Navigation

Program Structure and Planning > Unit Section Details > Unit Section Enrollments Limits, Waitlist and Reserved Seating

Additional Notes and Business Rules

Priority and preference: The reserved seating priority and preference indicates which students have higher priority for enrolling when unit or unit section spaces become available. You can identify priorities based on student attributes, such as program, unit set, program stage, organizational unit, class standing, or by a default date and time of the enrollment attempt.

Override Value: Click the **Override Value** button to enter data in fields populated by inherited data.

15.13 Waitlist

Use waitlist functionality to allow students to enroll into unit sections from which an enrolled student has withdrawn or for which there is an increase in the class size.

The **Waitlist Allowed** option must be selected for the required teaching calendars in the Institution Waitlist Options window. After selecting this option at the institution level, waitlist can be enabled at the required organizational levels. This is done by selecting the **Waitlist Allowed** option in the Organizational Unit Waitlist Setup window.

After selecting the waitlist allowed option at the institution and organization levels, select the **Waitlist Allowed** check box in the Unit Offering window.

Oracle Student System automatically enrolls the first student on a waitlist into a unit section if the student passes the validations configured. This is the default behavior if waitlist is enabled but no priorities or preferences are set up. Students are placed on the waitlist based on the time/date stamp of their request to be added.

You can set up Oracle Student System so that maximum credit points are validated during enrollment using both waitlisted and enrolled unit sections. In this case, when a student is moved from the waitlist to the unit section, the credit points will not change for the purpose of validation, and students will not fail to be enrolled based on credit points.

15.13.1 Setting Up Institution Waitlist Options IGSEN045

If waitlisting is allowed at the institution level, the option can be suppressed in some instances, such as enrollment for summer or other short terms. Institution Waitlist Allowed option settings have the following effects:

- If the option is set to **No**, no further waitlist windows are accessible for setup and no waitlist processing is invoked during that enrollment calendar instance.
- If the option is set to **Yes**, waitlist details can be set at the organization unit level on the Organizational Unit Waitlist Setup window.

You can also determine if students can be simultaneously placed on a waitlist for a unit section while being registered for an alternative unit section of the same unit. Student Simultaneous Waitlist Allowed option settings have the following effects:

- If the simultaneous waitlist is set to **No**, then Oracle Student System checks to see if the student is currently enrolled for an alternate unit section of the unit.

If this is the case, the system does not place the student on the waitlist and returns a response indicating that the student is already enrolled in another unit section and cannot be added to the waitlist for the same unit.

If the student is not enrolled in another unit section of this unit, the system places the student on the waitlist for the unit section.

- If the simultaneous waitlist is set to **Yes**, the system does not perform the previously described validation.

Prerequisites

Calendar types are set up.

Navigation

Enrollments > Setup > Institution Waitlist Option > Institution Waitlist Options

Additional Notes and Business Rules

Waitlist Allowed: If selected, then waitlisting is allowed for this specific calendar instance. Records for the teaching period cannot be modified or deleted if the **Waitlist Allowed** check box is selected at the organizational unit level, the unit offering pattern level, or the unit section level for the same teaching period.

Student Simultaneous Waitlist Allowed: If selected, simultaneous waitlisting and enrollment is enabled for this specific calendar instance. Records that allow simultaneous waitlisting cannot be modified or deleted, if the number of waitlisted students in the teaching period is greater than zero.

Credit point totals: You can count waitlisted unit sections in credit point totals. Credit point totals are used for minimum and maximum credit point validations during enrollment. When you set up waitlist functionality in such a way that waitlisted unit sections are included in credit point totals, the teaching period and term enrollment totals include enrolled and waitlisted credit points. When you set up waitlist functionality so that waitlisted unit sections are not included in credit point totals, the teaching period and term enrollment totals include only enrolled credit points.

Time conflicts: You can allow students with time conflicts to be placed on waitlists. When you set up waitlist functionality so that time conflicts are allowed with waitlisted unit sections, students may enroll in and be waitlisted for unit sections that overlap or meet at the same time. When you set up waitlist functionality so that time conflicts are not allowed with waitlisted unit sections, students may not enroll in and be waitlisted for unit sections that overlap or meet at the same time.

15.13.2 Setting Up Organizational Unit Waitlist Setup IGSEN046

Set up waitlist options at the organizational unit level.

Waitlist attributes are available at both the unit offering and the unit section levels. The Organizational Unit Waitlist Setup window inherits its details from the appropriate organization unit, and the Unit Section Waitlist window inherits its details from the appropriate unit offering.

Note: The first student to attempt to waitlist the unit section is assigned the first position in the waitlist.

Prerequisites

Calendar types are set up.

Organizational units are set up.

Navigation

Enrollments > Setup > Organizational Unit Waitlist Setup > Organizational Unit Waitlist

Additional Notes and Business Rules

Organizational Unit Code: This code is user-defined for an organizational unit. An organizational unit is identified by its code and start date.

Calendar Type: This field displays the user-defined name given to all calendars of a similar classification. Each calendar type must be assigned a calendar category for the system to determine calendar type functionality

Waitlist Allowed: If selected, waitlisting is enabled. Also allows you to enter additional information.

Simultaneous Waitlist/Unit Enrollment Allowed?: If selected, then a student can be simultaneously waitlisted for a unit section, even if the student is registered for an alternative unit section of the same organizational unit.

Order: This field indicates the order of the priority when assigning the waitlisted students to unit sections. If more than one priority is selected, by default the serial numbering is assigned to the priorities. The order of the priorities can be changed by clicking the arrow keys.

15.13.3 Setting Up Unit Offering Pattern Waitlist IGSPS075

Define waitlisting criteria for unit offering pattern enrollments. Waitlist limits and priorities are used during the enrollment process.

With waitlisting enabled, users can define waitlist setups at the unit level. These are inherited at the unit section level and can be modified there.

Navigation

Program Structure and Planning > Basic Unit Details

Additional Notes and Business Rules

Waitlist limits: The maximum number of students allowed on unit or unit section waitlist.

Priorities and preferences: Indicate which waitlisted students have priority when spaces become available. You can identify priorities based on student attributes, or by date and time of the enrollment attempt.

Setup rollover: Setups can be rolled over from one teaching period to another.

Override Value: Click the **Override Value** button to enter data in fields populated by inherited data.

15.13.4 Enrollment Limits, Waitlist and Reserved Seating IGSPS085

With waitlisting enabled at the institutional level, you can define waitlist setups at the unit offering pattern and unit levels. These unit level setups are inherited at the unit section level and can be modified at the same level.

The unit section enrollment limits and waitlist procedure determines details related to enrollment and waitlist controls and validations used during the enrollment process.

You can override the values at the unit offering level if the values are incorrect.

The organizational unit and unit section waitlisting is a series of inherited attributes that can be overridden at lower levels.

Additional Notes and Business Rules

Reserved Seating Allowed: If selected, then reserved seating is allowed for the unit section.

Waitlist Allowed: If selected, then waitlist is allowed for the unit section. You can select this checkbox only if the Waitlist Allowed checkbox is selected in the Unit Offerings window.

Priority Value field: For any given priority, at least one preference must be selected.

Preference Value field: This further defines criteria that determine the order in which students are waitlisted. Preference value is required for a priority value except where the priority value is Date and Time.

Override Value: Click the **Override Value** button in the **Enrollment Limits** tab to enter data in fields populated by inherited data.

15.14 Enrollment Validations

Enrollment validations allow you to set up a number of different steps to verify that a student is eligible for enrollment.

These steps can be set to **Warn** or **Deny**. If the step set to **Warn** and the student fails the validation, then enrollment is allowed with a message.

If the step is set to **Deny** and the student fails the validation, then enrollment is not allowed.

Validation steps are available to apply to program, person, and unit.

The following types of steps are available:

- Program
- Program and Unit Rule Checking
- Unit Rule Checking

Each of these types of rule checking are described in this section.

Program

Program rule checking validates a student's enrollment against rules specified for each program offering pattern in the Program Offering Patterns window.

The categories of program rules are:

- **Cross faculty:** Maximum number of credit points for which students can enroll in units of a faculty outside their program
- **Cross location:** Maximum number of credit points for which students can enroll in units at a location other than their program location
- **Cross mode:** Maximum number of credit points for which students can enroll in units with a mode other than their program mode
- **Cross historical faculty:** Maximum number of credit points for which students can enroll in units of a faculty outside their program, over the duration of the program

Program and Unit Rule Checking

Program and unit rule checking confirms that students enrolling in units adhere to the attributes of the program offering option, as specified in the Program Offering Options window.

The attributes of the program offering options are:

- **Forced location:** Units are taken at the location of the student's program offering option
- **Forced attendance mode:** Units are taken in the mode specified by the student's program offering option

- **Forced attendance type:** Derived attendance type for a student's program attempt is the same as the attendance type of the student's program offering option

Unit Rule Checking

Unit rule checking validates a student's enrollment against predefined rules.

15.15 Additional Information for Pre-Enrollment Configuration

Oracle Student System can accommodate programs that have rigidly defined structures in which students are required to take specific units in specific years. This configuration is typically referred to as the year of program model.

In this model, the unit set attempt is used to define the year of program in which the student is enrolled. You set up the sequence of the years of program. In addition to the unit sets representing the year of the program in which the student is enrolled, you can map other unit sets to the year of program. In this way, you can create streams, or concentrations. For example, for unit set Year of Program 1, users could map Year 1 French and Year 1 Math.

When the student is pre-enrolled in Year of Program 1, they are also pre-enrolled in Year 1 French and Year 1 Math. The patterns of study associated with each unit set is used to pre-enroll unit attempts.

Students advance to the next year of study if they have a progression outcome of **Advance**. If they have a progression outcome of **Repeat**, the pre-enrollment concurrent process does not enroll the students in the next year of program but attempts to enroll them in the unit attempts associated with the year of program that they have failed.

If a student has failed a class or examination and has to retake the class or exam, the student typically has a progression outcome mapped to a system outcome type of **Other**. These students are not picked up for pre-enrollment until their progression outcome changed.

Students with no progression outcome are treated as advancing to the next year of program.

It is assumed that progression outcomes of **Other** will be updated after the student has attempted to retake the class or examination and pre-enrollment run against those students once the progression outcome is changed.

15.15.1 Setting Up Unit Set Pre-Enrollment Configuration IGSPS124

Define the sequence for the unit sets that represent the years of the program. For example, users could set up Year of Program 1 as the first unit set, then Year of Program 2 as the second unit set. The sequence defined here tells the system which unit set attempt succeeds the previous in the year of program structure.

The unit sets selected in this window should be of the system type **Pre-enrollment Year**.

Year of Program Setup for UK Functionality

Year of program was developed for the United Kingdom but forms part of core Oracle Student System.

Set Up Year of Program Units

The year of program feature is implemented in Oracle Student System using unit sets. The unit sets have a system unit set category of pre-enrollment year.

A unit set is defined for each year of program. Core and optional units can be assigned to a year of program using patterns of study. Institutions can define either generic unit sets which can be assigned to many programs, or specific unit sets which apply to specific programs. The pre-enrollment of students onto unit sets is determined by the unit set pre-enrollment configuration, which specifies the order in which unit sets are taken.

Set up and maintain of the order of progression from one year of program to the next.

Prerequisites

Basic unit set details are set up and are active.

Navigation

Program Structure and Planning > Unit Set > Unit Set Pre-enrollment Configuration

Additional Notes and Business Rules

Mapping Set Code: Enter the mapping set code which identifies the unit set sequence.

Setting Up Unit Set Mapping

UK institutions with structured programs pre-enroll students in the appropriate core or core and optional units for the student's chosen stream or streams as well as for the student's year of program as the student progresses through the program.

A stream is a specialization within a program. For example, within a nursing program, a student may choose a pediatric stream. In other cases, students may choose more than one stream, or concentration. For example, for joint or combined honors programs, students may choose streams in Math and French.

Students successfully progressing through the program (those who have no progression outcome or a progression outcome of advance) are pre-enrolled from year to year based on the year-to-year unit set progression you define in the Unit Set Pre-Enrollment Configuration form. These unit sets are marked as administrative and act as the mechanism to advance the student through all the years of the program. In addition, you can define the units to be pre-enrolled for the year of program using the pattern of study associated with the program offering.

Unit Set Mapping

Map academic unit sets to the administrative unit sets that define the years of a program. When Oracle Student System determines the appropriate year of the program to pre-enroll the student, it also locates the unit sets mapped to the year of program in the Unit Set Mapping window. The student is pre-enrolled in all unit sets mapped to the administrative unit set in the Unit Set Mapping window.

To associate the appropriate units with academic unit sets, you must create patterns of study not only for the administrative unit sets, but also for the academic unit sets. Use the Unit Set Mapping window to map the academic unit sets to the administrative unit sets so that when pre-enrollment determines the appropriate administrative unit set for pre-enrolling, the associated academic unit sets and the units defined for them in the pattern of study are also pre-enrolled.

In some cases, a program and its streams have a common first year, then diverge in the second year. In these cases, you can set up the Unit Set Pre-Enrollment Configuration window so that there are different mapping codes for each possible stream of the program. For example, if a nursing program is split between child, adult, and learning disabilities streams, then you would define mapping codes for the three branches. You could then create a unit set for year 1 of the program that was mapped to all the streams, then for each stream (identified by a mapping code), there would be subsequent years specific to that stream.

Combined Honors

In combined honors scenarios, you create a program offering for the scenario (for example, GMSCombined). For each year of the program, you would create an administrative unit set, for example, GMSYear1, GMSYear2, GMSYear3. These unit sets would be configured in the Unit Set Pre-Enrollment Configuration window to advance the students through the program.

Using the Unit Set Mapping window, map GMSYear1 to the unit sets GeoYear1, MathsYear1, StatYear1. When the student is pre-enrolled in GMSYear1, the student is also pre-enrolled into GeoYear1, MathsYear1, and StatYear1 and the core or core and optional units defined for each unit set in the pattern of study. For each subsequent year, the mapping would be similar.

Prerequisites

Basic unit set details are set up and active.

The spreadsheet loader runs.

Mapping set code and sequence in mapping fields are populated.

Navigation

Program Structure and Planning > Unit Set > Unit Set Pre-enrollment Configuration > Unit Set Mapping > Unit Set Mapping

Additional Notes and Business Rules

Sequence in Mapping: Displays which year of program the student is enrolled in when enrolled on the unit set identified

Unit Set Code: Enter the unit set code to which the year of program unit set is mapped.

Mapping: A unit set cannot be mapped to itself. The student is pre-enrolled in all unit sets mapped to the year of program unit set defined in the Unit Set Pre-enrollment window. If an administrative unit set is not mapped to another unit set in the Unit Set Mapping form, then the Pre-enrollment concurrent process looks only at the pattern of study for the unit set defined in the Unit Set Pre-enrollment window.

15.16 Self-Service

Self-service configuration allows you to designate which load calendars are available for enrollment, as well as user rankings for users who have more than one person type.

In addition, you can indicate whether the student schedule should display by academic year or by load calendar (term).

15.16.1 Enrollment Setup IGSEN063

Select the load calendars and unit statuses records to be displayed to self-service users. If more than one person type exists, rank can be assigned to each person type. Depending on the ranking, different setup data is used for the self-service user with multiple person types.

You can allow self-service users to:

- View load calendars and select the load calendars records to be displayed.
- View unit section statuses and select the unit status records to be displayed.
- View rankings and assign a rank to each person type.
- Determine whether the schedule displays by load calendar or by academic year.

Prerequisites

Calendar instance relationships are set up.

Navigation

Enrollments > Setup > Enrollment Setup > Enrollment Setup

Additional Notes and Business Rules

Self Service: If selected, then records are displayed to self-service users.

IVR: Interactive Voice Recognition functionality is not supported for this release and should not be used.

Display: If selected, then unit section statuses are displayed to self-service users.

Display Schedule by Academic Year: If selected, the schedule is displayed by academic year. If deselected, the schedule is displayed on a term basis.

Term display: If displayed by Academic year, all the terms (load calendars) for the academic term are displayed. In addition, if there are pre-enrolled or enrolled unit

attempts in subsequent terms, those terms are displayed as well. When displayed by terms, those terms in which the student has unit attempts are displayed. The load calendars must be made available in self-service for the schedule to display information for that term.

15.16.2 Enrollment User Override Setup IGSEN057

You can grant special override privileges to administrative users. Any user-defined person type mapped to the system-defined person type of Self Service Enrollment Staff is available in this window. For each user-defined person type, you can provide different overrides.

If a user has more than user-defined person type of Self Service Enrollment Staff, the Self Service Enrollment Setup window is used to rank the user-defined person types. The user-defined person type with the lowest number has precedence.

If a validation step is set up in the Enrollment Category Setup or in the Enrollment Category Validations Setup windows, then you can set up the same step in the Enrollment User Override Setup window and change the step's behavior.

For example, if a step is set up as **Deny** in the Enrollment Category Validation Setup, then that step can be set up for an administrative user in the Enrollment User Override Setup window and the step behavior can be changed to **Warn** for the associated person type. In this way, an administrator can be granted greater privileges than a student.

CAUTION: If the step is not configured in the Enrollment Category Validation window, then setting the step at the Enrollment User Override Setup window level has no effect.

Overrides

For overrides, you can only override, not warn or deny. When you select and save an override, that override is in effect for the person type indicated.

Note: When the Override Variation Cutoff-Date override is associated with a user, then the variation cutoff date is not checked for that user.

For the overrides to have effect, you must choose them from the list of values. These overrides override configurations set at different points in the system. For example, the **Closed Unit Section** override allows the person for whom it is set up to enroll a student into a unit section even if the unit section is full, up to the override limit established in Program Structure and Planning.

Prerequisites

Calendar date alias instances are set up.

Administrative unit statuses are set up.

Person subsystem is set up.

Enrollment category validation setup is set up.

Navigation

Enrollments > Setup > Enrollment User Override Setup

Additional Notes and Business Rules

Date Alias: Date alias for last date when users can change the grading schema for a student unit attempt.

Default Steps: Displays all the validations for the validation step selected in **Show** field.

Enforced Validations: Displays all validations.

Deny: If selected, then validation restricts students from completing enrollment.

Warn: If this radio button is selected, validation warns students but enables enrollment completion.

Override window: The override window allows users to warn or deny any validation step set in the enrollment category. These steps are found in the **Validation Step** tab. In the **System Override** tab, you can override any system validations. These are system checks that are performed regardless of set up.

15.17 Timeslots

Enrollment timeslots are assigned to students in order to control the time periods during which enrollment is allowed. Timeslots can be configured to allow higher priority students to enroll before lower priority students.

You specify the daily start and end time and length in minutes of the timeslot appointment. Set timeslot setup data and run the concurrent process to assign students to timeslots.

Timeslots can be defined for terms or teaching periods. After you have set up dates and times for timeslots for either terms or teaching periods, priority is given to students to enable them to enroll during early timeslots. You can define the criteria for which you prioritize students and timeslots.

The **IGS: Validate Timeslots** profile option allows you to set start and end dates for enrollment within assigned timeslots or set a start date and allow enrollment until the census date.

15.17.1 Setting Up Timeslot Calendar Configuration IGSEN052

Create a timeslot name and define start date alias and end date alias for that timeslot. You can modify both of the date aliases.

Students enroll into unit sections, which are offered in teaching periods. Teaching periods are associated with terms (load calendars).

The timeslots limit access to the system for the specific load or teaching period.

Prerequisites

Calendar date alias instances are set up.

Navigation

Enrollments > Setup > Timeslot Calendar Configuration > Timeslot Calendar Configuration

15.17.2 Setting Up Timeslot Setup IGSEN048

Set priorities for a timeslot that is assigned to a student. For example, there are 20 students and 10 timeslots. The set up priorities are in the order of organizational unit, person ID groups, and program stage. If there are 15 students in the organizational unit, Oracle Student System searches for the students who are in organizational unit and also in person ID groups. If there are 12 students in an organizational unit and person ID groups, then Oracle Student System searches for students who are in organizational unit, person ID groups, and also in program stage. The first ten students who belong to this organizational unit, person ID groups, and program stage are assigned to the timeslot.

You can also assign preferences for the each priority. For example, a program type is selected as a priority and program type can consist of preferences in the order graduate, masters degree, and library. The program type with preference graduate is given the preference.

You can also assign timeslots without any priority.

The **Person Level Timeslot** is validated when timeslots are set up for the load calendar. The **Unit Level Timeslot** is validated when timeslots are set up for the teaching calendar.

Prerequisites

Calendar types are set up.

Optionally, organizational units are set up and person ID group definitions are set up.

Program type groups are set up.

Navigation

Enrollments > Setup > Timeslot Setup > Timeslot Setup

Additional Notes and Business Rules

Program Type Group: Enter a user-defined classification of higher education programs, such as higher doctorate, diploma, and non-award program.

Assign Randomly: If this check box is selected, then students of the selected program type and calendar are assigned to a timeslot without any priority and preference.

Priority Value: Priority values are based on which the timeslots are assigned to students.

Version: This field is enabled only if the priority selected is program

15.18 National Student Clearinghouse

The National Student Clearinghouse is a non-profit organization that aids in the student loan program for schools in the United States. The National Student Clearinghouse collects data to identify the following:

- Students who withdraw from school and need to begin repayment of student loans
- Students who transfer from one school to another
- Students who return to school and may be eligible for deferment of repaying student loans
- Students who continue school and are eligible for deferment of repaying student loans

Note: After the National Student Clearinghouse file is created, you are responsible for transporting the file to the National Student Clearinghouse.

15.18.1 National Student Clearinghouse Configuration IGSEN074

Set up national student clearinghouse configuration to gather data to be sent to the National Student Clearinghouse.

Prerequisites

Nominated completion periods are set up.

Institutions are set up.

Organizational units are set up.

Person details are set up.

Attendance type are set up.

Program types are set up.

Navigation

Enrollments > Setup > National Student Clearinghouse Configuration

Additional Notes and Business Rules

Default School Code: Enter your institution ID.

Branch Code ID Type: Enter your organization unit alternate ID type.

Default Branch Code: Enter your default branch code

Permanent Address Type: Enter permanent address type during the reporting period.

Date Graduated: Enter the date to use as the status start date, if the student has graduated. You can choose either the conferral date or the **Program Requirements Complete** date.

Non-Citizen Status Code: Enter the code used to designate the user defined citizenship type that eliminates all non-citizens from the NSC report.

Graduate Level Indicator: Select the program type that indicates it is a graduate program. Student enrolled only in programs of this type will be selected.

Correspondence Program Type Group: Enter the program type group code

Previous Last Name: Enter person alias type. If a student has more than one previous last name or alias type, recent person alias is selected.

Data Block Indicator: Enter the privacy data group. Enter information to identify the various attendance types.

15.19 HESA Reference Data

Enrollment data required by reporting to HESA and not captured in Oracle Student System is manually entered in the UK Statistics Student Program Attempt and Student Unit Set Attempt HESA Details windows.

The Maintain Codes window maintains the Oracle Student System reference codes used in the UK Statistics Student Program Attempt and Student Unit Set Attempt HESA Details windows.

The following table identifies each of the code sets for which code values must be defined.

Table 15–4 HESA Field Codes

Code	Description
OSS_NHS_EMPLOYER	OSS NHS Employer
OSS_PROPORTION	OSS Qualification Aim Proportion
OSS_TTA	OSS term time accommodation indicator
OSS_DIS_ALLOW	OSS disability allowance
OSS_HEENT	OSS New Entrant to HE
OSS_FEELIG	OSS Fee Eligibility Codes
OSS_MSTUFEE	OSS Major Source of Tuition Fees

The following table identifies each of the code sets for which code values must be defined for English and Welsh institutions.

Table 15–5 HESA Field Codes for English and Welsh Institutions

Code	Description
OSS_FESTUMK - English and Welsh institutions only	OSS Student FE marker values
OSS_CSTAT	OSS completion status
OSS_NONPAY	OSS reason for non payment values

Table 15–5 (Cont.) HESA Field Codes for English and Welsh Institutions

Code	Description
OSS_SUP_BAND	OSS additional support band values
OSS_FUNDCOM	OSS completion status
OSS_PROGRESS	OSS good standing marker
OSS_DEST - move this to the bottom of the list - with the header	OSS Destination
Welsh institutions should also set up	
OSS_ST13 group with OSS_DEST at bottom of list.	OSS SLDD - Discrete provision

See Chapter 27, "HESA" for information about using the Maintain Codes window.

Records: Advanced Standing

16.1 Advanced Standing

Advanced standing refers to the recognition of students' prior studies or experience as being equivalent to components of their current program attempt or attempts. As a result, students can be exempted from studying certain units and receive advanced standing in the program.

You can enter details of student applications for advanced standing and their outcomes.

The main functions of the Advanced Standing windows include the following tasks:

- Granting of advanced standing up to the limits specified for each program version in the Basic Program Details window
- Entering units for which advanced standing credit has been approved or from which the student has been waived, and the entering of alternate units
- Entering unit levels for which credit has been approved
- Entering approval details

The Advanced Standing windows interact with the Program Structure and Planning subsystem to apply limits on how much advanced standing can be granted within a given program attempt.

Advanced Standing also interacts with the Admissions and Enrollment subsystems to perform the following tasks:

- Grant advanced standing for approved units and unit levels when the program attempt status is **Enrolled** when the Process Advanced Standing Eligibility concurrent process is run

- Grant advanced standing, as an exception, when the program attempt status is **Intermit** or **Inactive**
- Expire advanced standing records when the program attempt status is not changed from **Unconfirm** to **Enrolled** prior to the record's expiration date, when the Expire Advanced Standing concurrent process is run

Advanced Standing Types

The following are the types of advanced standing:

Unit credit: Granted when prior studies, expertise, or experience satisfy the objectives of the specified unit. Frequently called an exemption.

Partial credit: Granted when prior studies, expertise, or experience satisfy a portion of the objectives of the specified unit and entered as credit point value

Unit level: Granted when program rules permit, for a number of credit points on the basis of prior studies judged to be acceptable within the structure of the program. Frequently called an unspecified exemption.

Unit preclusion: Entered when it is inappropriate for a student to enroll in a unit within the program structure. Student must enroll in another unit or group of units with an equivalent credit point value to satisfy program requirements.

Within a single program attempt, students can be granted a combination of unit credit, partial credit, and unit level advanced standing up to limits specified in the program rules. They can also be precluded from enrolling in specified units.

Advanced Standing Statuses

The system statuses that describe the status of a student's advanced standing application are as follows:

- **Approved:** Indicates student's advanced standing application has been assessed by a responsible authority and approved for the student's program attempt, but not granted.
- **Granted:** Indicates advanced standing, which is approved; applied to an enrolled student program attempt. A status of **Granted** can be applied manually, when an academic transcript is required immediately; however, it is typically applied by the Process Advanced Standing Eligibility batch process job, which checks advanced standing records with the status of **Approved** against the related student program attempts to determine if the program attempt status is changed to **Enrolled**. If it is, the advanced standing status changes to **Granted**.

- **Cancelled:** Manually entered when the request for advanced standing is withdrawn by the student, for example, when the student elects to study a unit for which advanced standing has been approved to increase knowledge in that area or improve grades.
- **Revoked:** Manually entered when the institution withdraws its approval of an application, for example, if an advanced standing application is approved on the basis of false or misleading information.
- **Expired:** Automatically applied when advanced standing has not been granted by specified date. Each advanced standing record with a status of **Approved** has an expiration date. The default expiration date is the approved date plus the number of months specified in the **Expiration Date Increment** field of the Advanced Standing Configuration Details window. The status of **Expired** is applied by the Expire Advanced Standing concurrent process which checks the expiration date of approved advanced standing records against the current date. If the expiration date is earlier than the current date, the advanced standing status changes to **Expired**.

16.1.1 Setting Up Advanced Standing Configuration IGSAV001

Enter data used by the Advanced Standing Details window.

The Advanced Standing Configuration window records control and default information used by advanced standing in the following fields:

Expiration Date Increment

Expiration date increment stores a default expiration date which can be overridden at the individual advanced standing item level.

Advanced standing, which applies to a particular student program attempt, is initially entered with a status of **Approved**, most commonly for **Unconfirmed** program attempts. When the program attempt status changes to **Enrolled**, the advanced standing status changes to **Granted**, and advanced standing is applied, typically when a student confirms enrollment and enrolls in units in a program attempt. If a program attempt is not confirmed within a specified period, the advanced standing status is changed to **Expired**. The **Expiration Date Increment** field stores the number of months added to the approved date of an advanced standing record to create a default expiration date.

Default Basis Institution

The **Default Basis Institution** field is optional, and designed to accelerate data entry. Insert a default basis institution if a large number of advanced standing

records are granted on the basis of prior studies at a single institution. The recommended default value is the code of your institution.

Prerequisites

Organizational structure setup is set up.

Navigation

Academic Records > Advanced Standing > Configure Advanced Standing > Advanced Standing Configuration

Additional Notes and Business Rules

Expiration Date Increment (Months): Enter the number of months after which approved advanced standing expires for each record in the Advanced Standing Unit Details and Advanced Standing Unit Level Details windows.

Default Basis Institution: Enter the value to default in the **Basis Details > Institution Name** field of the Advanced Standing Details window.

16.1.2 Setting Up System Advanced Standing Types IGSAV002

Advanced standing types are system-defined. You cannot create or delete advanced standing types. You can select the **Academic Transcription** and **Completion/Progression** check boxes to modify the effects of advanced standing types.

For example, selecting the **Completion/Progression** check box for advanced standing type credit indicates that advanced standing credit is counted toward completion and progression. Deselecting the **Completion/Progression** check box for type **Preclusion** indicates that advanced standing is not counted toward progression and completion.

Assign attributes to system-defined recognition types. A recognition type describes the effect an advanced standing application has on a student's enrollment when the application is approved. This section describes the following recognition types:

CREDIT

Credit can be granted for a particular unit when a student has undertaken prior studies considered equivalent to the unit.

PRECLUSION

Granting preclusion from a particular unit occurs when a student's prior studies are not adequate for credit, but studying the unit would not require the usual level of effort. Granting preclusion prevents a student from enrolling in that unit. Students are enrolled in the alternate unit instead of the precluded unit when the Batch Pre-Enrollment Process concurrent process is run.

Note: Alternate units in which the student can enroll can be specified.

For example, students who studied music in secondary school might be precluded from the Introduction to Music unit because the class is equivalent to their prior music studies. Alternate units, such as Music 1A or Music 1B, could be specified as options available to precluded students.

Note: In the Advanced Standing Details window, these values are placed in the Advanced Standing Type field.

Navigation

Academic Records > Advanced Standing > Advanced Standing Types

Additional Notes and Business Rules

Completion/Progression: If selected, then advanced standing details of an advanced standing type are considered towards completion or progression requirements of the program.

Academic Transcription: If selected, then advanced standing details of an advanced standing type are included on academic transcripts.

Transcript Display Options for Granted Advanced Standing:

- **Credit Points Total:** Indicates that only credit point totals will be printed on the transcript for advanced standing.
- **Credit Points Total and Previous Exams:** Indicates that only credit point totals and previous exam scores will be printed on the transcript for advanced standing.
- **Previous Units and Exams:** Indicates that all previous unit details and previous exam scores will be printed on the transcript for advanced standing work granted credit.

Records: Academic Statistics

17.1 Academic Statistics

You can maintain the summary record of a student's academic performance that appears on the student's transcript. This record includes summarized academic statistics, class standing, and rank in class.

Academic Statistics can be defined to include or exclude specific courses and can be used for progression and satisfactory academic progress rules as well as being included on the student's transcript. Class standing can be based on earned credit points or on year of program, and allows the grouping of students into similar achievement classifications. Class ranking compares the student's academic performance against others in a defined grouping based on GPA calculations.

17.1.1 Setup Overview

Class standing types must be created before program types are created. After program types are created, the class standing schedule is created within the program type. Within the class standing schedule, hours or years are defined, and you can indicate if class standing is effective immediately or at the end of the term.

The career program/unit relationships are created after program types but before units are created. The default behavior for academic statistics is to exclude any unit that does not have the program/unit relationship. Reference codes of system type **Stats** must be created for any exclude or include definitions in statistics.

Then, create statistic types. Statistic types can be **Calculated**, **Stored**, or **Both**. Statistic types are user-defined names of types, and you must specify which statistic elements will be used with each statistic type. The possible elements are the following:

- Attempted Credit Points

- Earned Credit Points
- Grade Point Average
- GPA Credit Points
- GPA Quality Points

Institution statistics are then created using the defined statistic types.

Organizational unit statistics can be defined to override institution statistics. You can use the same statistic type as defined at the institution or you can use a statistic type not defined at the institution level. These statistics are only displayed for student program attempts in which the program is owned by the organizational unit.

These statistics are only displayed for student program attempts in which the program is owned by the organizational unit. Statistics are generated dynamically. When defining statistic types, the most commonly used definition should be marked as **Standard**. The **Standard** type is used for system statistic calculations where the statistic type cannot be specified, such as class standing credit points.

17.2 Academic Statistics Profile Options

Set up the following profile options:

- **IGS: Academic History Display Type:** Set mode to display academic history

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see *Oracle Applications User's Guide*.

17.3 Configure Academic Records Display

Set up academic records display.

17.3.1 Institution View Academic History/Transcript Configuration IGSAS068

Customize the institution-level View Academic History self-service page. The Institution View Academic History / Transcript Configuration window lists the regions that are in the View Academic History self-service page along with a display check box that indicates whether or not to display the associated region in self-service.

If a corresponding Program Type configuration cannot be found, the institution configuration is used as the default.

The regions are dependent upon the system profile IGS: Academic History Display Type and will vary.

Navigation

Academic Records > Academic Statistics > Institution View Academic History/Transcript Configuration

Additional Notes and Business Rules

IGS: Academic History Display Type: The window you see is dependent on the system profile setting for IGS: Academic History Display Type profile option. If the profile option is not set, you will get an error message.

Default: The Institution Configuration window is the default for the institution, and there can only be one institution default configuration.

Oracle Student System in Career mode:

- **Display Current Career First:** Defines the order in which the career information is displayed. If selected, then student's current or most recent career is displayed first in reverse chronological order. Otherwise, the display is in chronological order.
- **Display Basis of Admission Region:** If deselected, then **Test Scores, Summary of Advanced Standing, and Basis of Admission Note** must be deselected also.
- **Display Term Details Region:** If deselected, then **Unit Details, Unit Notes, Advanced Standing, Statistics, Class Rank, Intermission, Special Requirements, and Term Note** must be deselected also.
- **Display Program Completion:** If deselected, then **Display Degree Note** must also be deselected.

Oracle Student System in Program mode:

- **Display Current Program First:** Defines the order in which the program information is displayed. If selected, then student's current or most recent program is displayed first in reverse chronological order. Otherwise, the display is in chronological order.
- **Display Basis of Admission Region:** If deselected, then **Test Scores, Summary of Advanced Standing, and Basis of Admission Note** must be deselected also.

- **Display Term Details Region:** If deselected, then **Unit Details, Unit Notes, Advanced Standing, Statistics, Class Rank, Intermission, Special Requirements,** and **Term Note** must be deselected also.
- **Display Program Completion:** If deselected, **Display Degree Note** must also be deselected.

Year of Program mode:

- **Display Current Program First:** Defines the order in which the program information is displayed. If selected, the student's current or most recent program is displayed first in reverse chronological order otherwise the display is in chronological order.
- **Display Year of Program Details Region:** If deselected, then **Unit Details, Unit Notes, Advanced Standing, YoP Results, Intermission, Special Requirements,** and **YoP Note** must be deselected also.
- **Display Program Completion:** If deselected, then **Display Degree Note** must also be deselected.

17.3.2 Program Type View Academic History/Transcript Configuration IGSAS068

Customize the program type-level View Academic History self-service page. This holds the configuration that is used for a corresponding program type.

The Program Type View Academic History / Transcript Configuration window lists a program type as well as the regions that are in the View Academic History self-service page along with a display checkbox that indicates whether or not to display the associated region in self-service.

The regions are dependent upon the system profile IGS: Academic History Display Type and will vary.

Navigation

Academic Records > Academic Statistics > Institution View Academic History/Transcript Configuration

Additional Notes and Business Rules

IGS: Academic History Display Type: The window you see is dependent on the system profile setting for IGS: Academic History Display Type profile option. If the profile option is not set, you will get an error message.

Default: The Program Type Configuration window is the default for the program type, and there can only be one configuration per program type.

Oracle Student System in Career mode:

- **Program Type:** Program type for which the configuration is active.
- **Display Current Career First:** Defines the order in which the career information is displayed. If selected, the student's current or most recent career is displayed first in reverse chronological order. Otherwise, the display is in chronological order.
- **Display Basis of Admission Region:** If deselected, then **Test Scores**, **Summary of Advanced Standing**, and **Basis of Admission Note** must be deselected also.
- **Display Term Details Region:** If deselected, then **Unit Details**, **Unit Notes**, **Advanced Standing**, **Statistics**, **Class Rank**, **Intermission**, **Special Requirements**, and **Term Note** must be deselected also.
- **Default Value:** If deselected, then **Display Degree Note** must also be deselected.

Oracle Student System in Program mode:

- **Program Type:** Program type for which the configuration is active.
- **Display Current Program First:** Defines the order in which the program information is displayed. If selected, the student's current or most recent program is displayed first in reverse chronological order. Otherwise, the display is in chronological order.
- **Display Basis of Admission Region:** If deselected, then **Test Scores**, **Summary of Advanced Standing**, and **Basis of Admission Note** must be deselected also.
- **Display Term Details Region:** If deselected, then **Unit Details**, **Unit Notes**, **Advanced Standing**, **Statistics**, **Class Rank**, **Intermission**, **Special Requirements**, and **Term Note** must be deselected also.
- **Display Program Completion:** If deselected, the **Display Degree Note** must also be deselected.

Year of Program mode:

- **Program Type:** Contains the program type for which the configuration is active
- **Display Current Program First:** Defines the order in which the program information is displayed. If selected, the student's current or most recent program is displayed first in reverse chronological order. Otherwise, the display is in chronological order.

- **Display Year of Program Details Region:** If deselected, then **Unit Details, Unit Notes, Advanced Standing, YoP Results, Intermission, Special Requirements,** and **YoP Note** must be deselected also.
- **Display Institution Unit Details:** If the **Year of Program Details Region** check box is deselected, this must also be deselected. I
- **Display Program Completion:** If deselected, the Unit Notes must be deselected. If the Institution Unit Details checkbox is unchecked, this must also be unchecked

17.4 Class Standing

You can group students into cohorts based on stages of completion. You have the ability to define class standing according to your own criteria such as progressive years or ranges of successfully completed credit points toward program completion. Define class standings such as the following:

- Freshman
- Sophomore
- Junior
- Senior

You then define how a program is staged for completion by defining the credit ranges for each of the class standings or by specifying an academic year. Additionally, you have the option to update the students' class standing at the beginning of each term or maintain students' class standing status dynamically when students' earned credit points change.

The derived class standing can be overridden for specific student program attempts.

17.4.1 Setting Up Class Standing IGSPR015

Configure class standing data to be used by the Class Standing Schedule window.

Navigation

Academic Records > Academic Statistics > Class Standing

17.4.2 Setting Up Class Standing Schedules IGSPR016

Set credit ranges or academic years associated with a defined class standing to track program completion by program type.

Prerequisites

Class standing is set up.

Program types are set up.

Navigation

Program Structure and Planning > Program > Program Types > Program Types > Class Standing Schedule

Additional Notes and Business Rules

Effective Dates: Enter program type effective start and end dates. The Start Date and End Date cannot overlap with other program type class standing schedule records for the same program type.

Maximum Credit Point: The value in this field must be greater than or equal to minimum credit point. This field is required if academic year is not selected.

Academic Year: This field is required if minimum credit point and maximum credit points are not selected.

17.5 Career/Program/Unit Relationship

Set up relationships among career, program, and units. A student can have unit attempts at an institution that were completed under multiple program attempts and career attempts. You can designate unit attempts to be counted in student career statistics or printed on a student career transcript.

Certain units may call for an exception in the way a unit is treated. Exceptions include the program to which the unit counts, whether the unit is computed as part of a student's GPA, whether the unit is computed in the academic statistics for each program, and whether the unit shows on different types of transcripts.

You can apply changes at the student's unit attempt level to designate units to apply to a student's career statistics and determine whether these units are included on the student's career transcript. For example, ENGR523 is a unit that may be used for both undergraduate and graduate credit. The application of credit is determined by the career of the student attempting the unit. STAT350 is an undergraduate unit

that a graduate student is taking to meet a prerequisite, even though it will not count toward the student's graduate career program attempt.

17.5.1 Setting Up Program / Unit Relationships IGSPS123

Create relationships between unit attempt and student career statistics or unit attempt and student career transcript.

Prerequisites

Program types are set up.

Unit program type level is set up.

Navigation

Academic Records > Academic Statistics > Career Program/Unit Relationship > Career Program/Unit Relationship

Additional Notes and Business Rules

Student Career Transcript: If selected, then student unit attempt for this level is displayed on the student career transcript.

Student Career Statistics: If selected, then student unit attempt for this career level is included in the student's career statistics calculation.

17.6 Academic Statistics Calculation

Complete this setup to calculate academic statistics such as GPA.

17.6.1 Setting Up Student Statistic Types IGSPR018

Define system statistic elements such as Attempted Credit Points, Earned Credit Points, Grade Point Average, GPA Credit Points, or GPA Quality Points to be associated with a defined statistic type.

Note: To create a program GPA, you can define a statistic type by organizational unit and specify certain units to include in the calculation.

Navigation

Academic Records > Academic Statistics > Student Statistic

Additional Notes and Business Rules

Student Statistic Type: This value is displayed in self-service when the Statistic Configuration Display check box is selected.

17.6.2 Setting Up Institution Statistic Type Configuration IGSPR019

Define the order in which the student statistic types are displayed, indicate if you want to include local or external advanced standing credits in the statistic calculation, and determine which units to include or exclude from the statistic calculation.

Note: Any definition entered in this window can be overridden by defining the values in Organization Unit Statistic Type Configuration window.

The display order defines the order in which the statistics are displayed on the View Academic History self-service page.

Prerequisites

Student statistic types are set up.

Reference code types are set up.

Navigation

Academic Records > Academic Statistic > Institution Statistic Type Configuration > Institution Statistic Type Configuration

Additional Notes and Business Rules

Standard: If selected, then standard calculation is used whenever the application calls for a GPA. There can be only one Standard for a term and cumulative, or both.

Display: If selected, then this statistic type will be displayed in the View Academic History self-service page.

Include Standard Units: If selected, then all student unit attempts are included in the statistic calculation. This check box must be selected to include student unit attempts.

Include Local Institution Advanced Standing Units: If selected, then local institution advanced standing units and levels are included in the statistics calculation.

Include Other Institution Advanced Standing Units: If selected, other institution advanced standing units are included in the statistics calculation.

Unit Reference Codes: If selected, then inclusion or exclusion of units based on the unit reference code is indicated. The unit reference code must be of system type **Stats**.

17.6.3 Program Unit Level Mark Configuration IGSPR025

Define how core, optional and elective designations on units attempts are selected when a student takes more units than are required for the unit level. The Program Unit Level Mark Configuration window allows you to define a different unit selection by program. This selection overrides the institutional setup for unit level mark configuration.

This configuration is optional.

Navigation

Academic Records > Statistics > Program Unit Level Mark Configuration

Additional Notes and Business Rules

Total Unit Level Credits: Enter the total number of unit level credits that are used for calculation of the unit level mark.

Select Unit Attempts by Total Credits Only: Define the process for selecting unit attempts for calculating the unit level mark.

Select Unit Attempts by Priority Only: Define the process for selecting unit attempts for calculating the unit level mark.

Core Unit Indicator: Enter the type of unit attempt.

Total Credits: Enter the total number of credits that are counted within the unit level for the core indicator type. This field is required if selection method is **Total Credits**, and disabled if the selection method is **Priority**.

Required: This field contains an indicator meaning that the total credits are required for the check box and should not be rolled up into other priorities. This field is required if selection method is **Total Credits**, and disabled if the selection method is **Priority**.

Priority: This field contains a number indicating the order that the core indicator type units are selected. The value must be a number between one and three, and must be unique within that range.

Program Attempt Selection: Define the manner in which program attempts are selected for inclusion in the program level mark calculation. Possible values are **Best Mark** and **Last Program Attempt**.

Profile option: This window is accessible when IGS: Career Model Enabled is set to **No**.

17.6.4 Institution Unit Level Mark Configuration IGSPR025

Define how core, optional, and elective designations on units attempts are selected when a student takes more units than are required for the unit level. The Institution Unit Level Mark Configuration window sets the default action for all programs.

This configuration is optional. If no configuration is defined for the unit level mark, the unit level mark calculation uses all of the unit attempts found at the unit level subject to the selection rules for unit attempt outcomes.

Navigation

Academic Records > Statistics > Institution Unit Level Mark Configuration

Additional Notes and Business Rules

Profile option: This window is accessible when IGS: Career Model Enabled is set to **No**.

Default: Institution configuration is the default for all programs that do not have a program configuration defined.

Optional field: The **Total Unit Level Credits** field is optional; however, a message appears when the unit level selection method is **Total Credits** and no value is entered in this field.

Sum of values: When the unit level selection method is **Total Credit**, the sum of all values entered into the **Total Credits** field should equal the total unit level credits.

Core indicator type: A Unit Level Mark Configuration must be saved with at least one core indicator type defined.

Priority value: When the unit level selection method is **Total Credits**, the priority value determines which units to select if there are no units for a particular defined core indicator type. Priority values are 1,2, and 3. The value 1 is the highest priority and 3 is the lowest priority.

Unit Attempt Selection: Define the manner in which unit attempts are selected for inclusion in the unit level mark calculation. Possible values are **Best Mark** and **Last Unit Attempt**.

17.7 Organizational Unit Level Calculation

Set up organizational unit level calculation if one or more of your organizational units calculate statistics differently than your institution.

For instance, if the Business College treats the inclusion of certain remedial units differently than the College of Liberal Arts, the excluded units can be different for a statistics calculation for Programs owned by the Business College.

Another example is a program that has a special GPA requirement for certain units that the other programs do not require. For example the School of Nursing has a requirement that all units in science must be carried with a 2.0 GPA. A special statistic type called **Nursing Sciences** is created and not included in the institutional configuration but is included in the organizational configuration for the Nursing School. The statistic type is set to include only science units (using the reference code setups). Only those students enrolled in the programs owned by the school of Nursing have this **Nursing Sciences** statistic.

17.7.1 Setting Up Organizational Unit Statistic Type Configuration IGSPR020

Define the units that are calculated, how units are calculated, and the order in which units are displayed in self-service pages.

You can override your institution statistic type by defining a statistic type for an organizational unit.

Prerequisites

Organization structure setup is complete.

Student statistic types are set up.

Navigation

Academic Records > Academic Statistic > Organization Unit Statistic Type Configuration > Organization Unit Statistic Type Configuration

Additional Notes and Business Rules

Standard: If selected, this statistic type is used as the default calculation. There can only be one statistic type designated as standard for a specific time frame.

Display: If selected, then this statistic type will be displayed in the View Academic History self-service page.

Unit Reference Codes: If selected, then inclusion or exclusion of units based on the unit reference code is indicated. The unit reference code must be of system type **Stats**.

Include Standard Units: If selected, then all student unit attempts are included the statistic calculation.

Include Local Institution Advanced Standing Units: If selected, then local institution advanced standing units and levels are included the statistic calculation.

Include Other Institution Advanced Standing Units: If selected, other institution advanced standing units are included the statistic calculation.

17.8 Class Ranking

Class Rank provides comparative information on a student's academic performance in relation to a group of students. This information can then be displayed on a student's transcript or be viewed within self-service.

17.8.1 Setting Up Class Rank Cohorts IGSPR024

Defines cohorts and tracks run information. Create a cohort definition that is composed of a unique cohort name, a cohort description, an optional responsible organizational unit, a GPA statistic, a default display type, the ranking method, and display indicators.

Prerequisites

Organization structure setup is complete.

Institution statistic types are set up.

Calendar relationships are setup.

Navigation

Academic Records > Academic Statistics > Class Rank Cohorts

Additional Notes and Business Rules

GPA Statistics: Enter the higher education statistic type that the cohort ranks against.

Period: Enter the timeframe for statistic calculation. Valid values include Cumulative and Term.

Default Display Type: This field is used when displaying the statistic without specification. This is the default display in self-service.

Do Not Skip Values in the Event of Ties: If selected, then dense rank instead of the default rank is specified.

Include On Student Transcript: If selected, then rank is displayed on the transcript.

Include on Student Academic History: If selected, then rank is displayed in self-service.

Class Rank Cohort Instance: Enter the calendar description of the selected period for which the cohort has been run against. Valid values include any active load (term) calendar that has not previously been associated with this specific cohort name

Cohort Total: The cohort total is the total number of students within the cohort instance.

Cohort Status: Specify if the cohort will evaluate the population or use the stored population. If the Cohort is Frozen, the comparison of GPA goes against the selected population and does not reselect the population based on the cohort selection rules. For example, the cohort is to select all freshmen students. Run the concurrent process once to find all the freshmen. If the cohort is frozen, any subsequent GPA comparisons use the students previously selected rather than selecting all of the freshmen again.

Run Date: The run date is the date that the Cohort Instance Ranking concurrent process is run.

Rank Status: Specify if student rankings are available for display.

Records: Progression

18.1 Progression Configuration

You can evaluate students' academic progress, apply outcomes that can involve holds, produce positive outcomes such as awards, allow specific groups of students to be targeted by progression rules, and determine the student's progression status.

Create progression rules to evaluate students' academic progress. The timing of progression measurement within your institution and the consequences if a student fails to progress must be decided.

Define the progression outcomes for your entire institution, and then link them to seeded system outcome type values. Define progression rule categories for your entire institution as well.

Navigate through the appropriate windows, Basic Program Details, Program Types and Organizations, to attach the progression rule applications within the hierarchy to target particular organizational units, program types and program versions.

Use program categories to override rules at different levels. When there are progression rules applications with the same rule category at different levels within the hierarchy, the rules are the more specific level override other rules. For example, program version rules override program type rules of the same rule category.

Program type and program version determine to which students the progression rule application is applied. There are also some additional fields such as **Attendance Type**, **Min/Max CP** and **Class Standing** that can be used to target specific students.

The progression rule application has progression outcomes related to it which use the progression outcomes types and specify the punishment for failing the rule or the award for being successful. The progression rule application also has progression calendars related to it which specify what periods to apply a rule to,

when to start applying it, and how many times to apply it. It also has a start and end calendar instance to turn on and off rules as policies change.

The progression rule application brings the measurement (rule), timeframe (calendars) and punishment/award (outcomes) together. This can only be navigated to through the context windows of Program Type and Program Version.

The Progression Rules window is completely optional. You can optionally define calendars and outcomes for progression rule categories.

Progression Outcome Types

Progression outcome types are user-defined and mapped to system progression rule outcome types and hold types. When a progression outcome type is mapped to a hold type, this hold represents the penalty that applies to a student who fails a progression rule.

All progression rules result in true or false. Rules can be applied at a number of levels within a defined hierarchy. This hierarchy includes the following:

Student program attempt

Program version

Organizational unit

Program type

This hierarchy represents the different places to which you can apply rules to target specific groups of students.

The hierarchy only affects progression rule applications of the same category at different levels. When you define a rule at student program attempt level, it overrides rules of the same category at the other levels.

For example, if you have specific policies for progression for graduate and undergraduate students, you will create your progression rule applications against program types. If the Law program at your institution has a different policy, it would be applied at the program version level and this would override the rules at the program type level used by all of the rest of the institution.

Progression Rule Categories

Progression rule categories window are user-defined and are mapped to system rule call codes. System progression rules are organized into rule groups. These rule groups determine the rules that you choose when you define a progression rule. You can also create progression calendars and outcomes that are inherited by the

progression rules that are defined for a rule category. Progression rules of the same progression rule category can be defined at different levels within the hierarchy. Rules defined at a higher level in the hierarchy override rules of the same category defined at lower levels.

Progression Rule Applications

You can create progression rule applications by using an existing progression rule as defined by the Progression Rule Categories window or by defining a specific rule for this application by clicking **Edit Rule**. A progression rule application consists of the following:

Rule

Calendar

Outcome

Progression calendars and outcomes can be part of the progression rule application or they can be inherited from the Progression Rule Category window or Progression Rule window if they have been defined in those windows.

Applying Rules

To apply the calendar and outcome to the rule, click **Manual Rule Check** on the Student Progression Rule Check window or run the concurrent process to create the student progression rule check and student progression outcome records.

You can also approve or waive large numbers of student progression outcome records and to apply any outcome effects.

The Student Progression Outcome window enables users to edit records created through the rule application process by using the details from the progression outcome records or create records manually.

The outcomes attached at the Progression Rule Application may be incomplete, so additional details may be required before the student progression outcome can be applied. For example, failure of a rule could require one or more of several different remedial units to be taken. At the progression rule application level, the outcome might not include the specific remedial units. Before the student progression outcome can be applied, the units must be specified. This can be decided by the progress committee.

Typically at the end of the term, a determination of the student's academic progress is made. This determination is based on user-defined rules that apply measures such as grade point average, weighted average marks, credit points attempted and

earned, specific unit failure and other measures. Prior progression period outcomes can also factor into the evaluation of the student's academic progress.

Honors can be awarded at the end of each progression period, then of a program stage, or at graduation. You can define progression rules to identify students who perform well and the associate positive outcomes with those rules.

18.1.1 Setting Up System Progression Configuration IGSPR002

Progression must be configured at a system-wide level to establish the default progression fields for the whole institution.

Critical dates must be specified to establish the default progression application cycle. You can measure progression at the end of each term. You can choose to measure progression for summer semesters or use different standards. These dates apply to your entire institution unless they are overridden. You can define the names for these date alias types.

Enter the required user-defined date alias types against the system date names, which enables their recognition by Oracle Student System, in the System Progression Configuration window. The definition of date alias types and the allocation of actual values to them are entered in Calendar windows. The set of progression calendars that applies across your entire institution is specified in this window.

Calendar types, applicable at the system level, must be specified. Progression rules within a calendar are considered only if the system configuration or the override configuration specifies that a progression calendar type is a recognized progression period in the system.

Create Calendar Types of **Progress**. In the System Progression Configuration window, click the **Progression Calendars** button to go to the System Progression Calendar window in which you can enter calendar types and group them into streams.

When you attach progression calendars to the progression rule application, the calendar type must have been defined at the System Progression Calendar window for the rule application process to work correctly.

Calendar types for use in this window are created in the Calendar Types window. Only calendar types with a calendar category of **Progress** can be entered.

Other fields are also established at a system-wide level in this window. These fields control the consequences after failure of a progression rule, such as the availability of an appeal period or the timing of outcomes application related to the rule failure.

The system-wide configuration established in this window can be overridden for specified organizational units in the Organizational Unit Progression Configurations window or specified program versions in the Program Version Progression Configurations window.

A stream number represents a logical sequence of progression periods. For example, progression calendars that represent semesters are logically a different sequence from an annual calendar. Therefore, a stream number of 1 could be entered for both semester calendars, but the annual calendar type would require a different stream number, such as 2.

Streams are important as they are used to determine if a student has failed the same progression rule more than once and if they have failed it on consecutive occasions.

Note: A stream number must be entered against each calendar type.

Prerequisites

Calendar types are set up.

Date aliases are set up.

Navigation

Academic Records > Progression > System Progression Configuration > System Progression Configuration

Additional Notes and Business Rules

Check boxes: The **Show Cause** or **Appeal** check boxes must be selected if a show cause and appeal period is to be available at your institution at any level. **Show Cause** and **Appeal** check boxes must be selected at this system level to enable their configuration at either an organizational unit level in the Organizational Unit Progression Configurations window or at the program version level in the Program Version Progression Configurations window. When the **Calculate Weighted Average Mark** and **Calculate Grade Point Average** check boxes are selected, you can calculate, store, and display a weighted average mark or grade point average value for all student program attempts as required.

Effective End Date Alias: This date alias represents the end of a progression period. Any student unit attempt results recorded prior to this date contribute to that progression period.

Apply Start Date Alias: This date alias represents the date on which the automatic process of checking students against progression rules can begin in a progression period.

Apply End Date Alias: This date alias represents the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only **ToDo** entries are checked.

End Benefit Date Alias: This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to **Goodstand**.

End Penalty Date Alias: This date alias represents the final date, by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically.

Hold End Date Alias: This date alias represents the expiry date for holds, due to expire within the related progression period. A date alias must be nominated to represent this, in the system-wide progression configuration. Where an hold end date alias does not exist, the calendar end date is used.

Appeal: If selected, then a value for Appeal Cut Off Date Alias field can be specified.

Appeal Cut Off Date Alias: Enter the date by which any appeal period must end and description. A value can be selected only if the Appeal check box is selected.

Apply Outcome Before Appeal: This check box is selected by default. If deselected, then an outcome is applied after the appeal period.

Count Suspension In Time: If selected, then outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time.

Calculate Weighted Average Mark: If selected, then the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Count Exclusion In Time: If selected, then outcomes resulting from failure of a progression rule are included in the calculation of elapsed time.

Calculate Grade Point Average: If selected, then the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Stream Number: This field represents a logical sequence of progression period. A stream number must be entered against each calendar type.

18.1.2 Organizational Unit Progression Configurations IGSPR004

Organizational units can override default or system-wide configuration for the progression functionality. Only **Active** organizational units can be configured. Apply progression rules for student program attempts within your organizational unit.

Progression rules within a calendar are evaluated for student program attempts under an organizational unit only if the configuration specifies that a progression calendar type is a recognized progression period for that organizational unit.

The Organization Unit Progression Configuration window allows you to have the progression policy applied differently for different organizations. Click the **Progression Calendars** button to go to the Organizational Unit Progression Calendar window in which you can enter calendar types and group them into streams. Doing this allows the organization to operate on different timeframes and groupings. If there is no configuration for an organization, the system level settings and calendars are used.

You can also specify the consequences of failure of a progression rule such as the availability of an appeal period or the timing of application of outcomes related to the rule failure.

To configure progression at an organizational unit level, all configuration fields must be specified. To maintain organizational unit progression configurations, you must include the specifications of the set of progression calendars that apply at the organizational unit level. To delete an organizational unit progression configuration, all links to progression calendars must first be deleted.

Prerequisites

Date aliases are set up.

Navigation

Academic Records > Progression > Organization Unit Progression Configuration

Academic Records > Progression > Organization Unit Progression Configuration > Progression Calendars > System Organizational Unit **Progression Calendar**

Additional Notes and Business Rules

Effective End Date Alias: This date alias represents the end of a progression period. Any student unit attempt results recorded prior to this date contribute to that progression period.

Apply Start Date Alias: This date alias represents the date on which the automatic process of checking students against progression rules can begin in a progression period.

Apply End Date Alias: This date alias represents the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only **ToDo** entries are checked.

End Benefit Date Alias: This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to **Goodstand**.

End Penalty Date Alias: This date alias represents the final date, by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically.

Show Cause: If selected, then a value for Show Cause Cut Off Date Alias field can be specified.

Apply Outcome Before Show Cause: If selected, then application of outcome is required before the show cause period.

Show Cause Cut Off Date Alias: If this field is selected, then date by which any show cause period must end is specified. A value can be selected only if the Show Cause check box is selected.

Appeal: If selected, then a value for Appeal Cut Off Date Alias field can be specified.

Appeal Cut Off Date Alias: Enter the date by which any appeal period must end and description. A value can be selected only if the Appeal check box is selected.

Apply Outcome Before Appeal: This check box is selected by default. If deselected, then an outcome is applied after the appeal period.

Count Suspension In Time: If selected, then outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time.

Calculate Weighted Average Mark: If selected, then the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Count Exclusion In Time: If selected, then outcomes resulting from failure of a progression rule are included in the calculation of elapsed time.

Calculate Grade Point Average: If selected, then the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Stream Number: This field represents a logical sequence of progression period. A stream number must be entered against each calendar type.

18.1.3 Setting Up Program Version Progression Configuration IGSPR003

Configure progression functionality for a nominated program version. Only program versions set to **Active** can be configured. You can override the default or system-wide progression configuration to meet the needs of a particular program version. In the application of progression rules, the configuration defined for a program version takes precedence over student program attempts within that program.

To configure progression for a program version, critical dates must have a date alias type assigned. To configure progression at a program version level, all configuration fields must be specified. Those selected can be date alias types defined specifically for the program version or date alias types that have been defined and used at other progression configuration levels.

To delete a program version progression configuration, all links to progression calendars must be deleted first. The progression calendar types used by the program version must be specified. Progression rules within a calendar are evaluated for student program attempts under this program only if this configuration specifies that a progression calendar type is a recognized progression period for this program version.

The program version configuration established in this window overrides progression configuration for the parent organizational unit, if it has been configured, and the system-wide default configuration.

Prerequisites

Date aliases are set up.

Navigation

Academic Records > Progression > Program Version Progression Configuration

Additional Notes and Business Rules

Apply Start Date Alias: This date alias represents the date on which the automatic process of checking students against progression rules can begin in a progression period.

Apply End Date Alias: This date alias represents the date at which automatic application of progression rules (checking a student for the first time in a progression period) ends. After this date, only **ToDo** entries are checked.

End Benefit Date Alias: This date alias represents the final date, by which a progression outcome can be automatically altered to the benefit of a student. A student who initially failed a progression rule, had an amended result entered, is re-tested and now passes the rule should have the original outcome removed. If this re-test occurs before this date, the existing outcome can be automatically removed and the student's progression status returned to **Goodstand**.

End Penalty Date Alias: This date alias represents the final date by which a progression outcome would be automatically altered, to the disadvantage of a student. A student who initially passed a progression rule, had an amended result entered, is re-tested and now fails the rule should have a progression outcome applied. If this re-test occurs after this date, the resulting outcome cannot be applied automatically.

Show Cause: If selected, then a value for Show Cause Cut Off Date Alias field can be specified.

Show Cause Cut Off Date Alias: If this field is selected, specifies the date by which any show cause period must end and description. A value can be selected only if the Show Cause box is selected.

Apply Outcome Before Show Cause: If selected, then an application of outcomes is required before the show cause period.

Appeal: If selected, then a value for Appeal Cut Off Date Alias field can be specified.

Appeal Cut Off Date Alias: Enter the date by which any appeal period must end and description. A value can be selected only if the Appeal check box is selected.

Apply Outcome Before Appeal: This check box is selected by default. If deselected, then an outcome is applied after the appeal period.

Count Suspension In Time: If selected, then outcomes resulting from failure of a progression rule are to be included in the calculation of elapsed time.

Calculate Weighted Average Mark: If selected, then the weighted average mark is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Count Exclusion In Time: If selected, then outcomes resulting from failure of a progression rule are included in the calculation of elapsed time.

Calculate Grade Point Average: If selected, then the grade point average is calculated and displayed in the Student Progression Rule Check window after a rule check has been performed.

Stream Number: This field represents a logical sequence of progression period. A stream number must be entered against each calendar type.

18.1.4 Setting Up Progression Outcome Types IGSPR008

Enter user-defined progression outcome types and map them to system progression rule outcome types. When an outcome entered against a student program attempt, is approved the system outcome type can trigger changes to the progression status of the student program attempt.

For example, when a student fails a progression rule with the system-defined outcome type of **Suspension** and this outcome has been approved by the relevant academic committee, the student's progression status becomes **Suspension**.

A progression outcome can also be mapped to a hold type. These holds represent the penalty that applies to a student who fails a progression rule, with the associated outcome type.

The impact of each approved outcome type on a student's progression status is described in the table below.

Table 18–1 System Progression Outcome Types

System Progression Rules Outcome Type	Suggested Use	Allowable Hold Types and Effect Types	Progression Status When Outcome is Approved
Degree Award	Used for special awards such as Dean's List honors	No hold type can be set for any outcome type mapped to this system type	No effect on status
Advance	UK Specific. Used to indicated that student should advance to next Year of Program (YOP)	No hold type can be set for any outcome type mapped to this system type	No effect on status
Repeat Year	UK Specific. Used to indicated that student should repeat the current Year of Program (YOP)	No hold type can be set for any outcome type mapped to this system type	No effect on status
Expulsion	Used for expulsion from the institution, as represented by a program group	A hold type with a hold effect type of Exclusion must be defined for an outcome of this type.	Expulsion
Exclusion	Used to exclude a student from a program group, program, unit set, or unit	A hold type with a hold effect type of Exclusion must be specified.	Exclusion
Suspension	Used when suspension from a program is the result of a progression rule failure	A hold type with a hold effect type of Suspension must be specified.	Suspension

Table 18–1 (Cont.) System Progression Outcome Types

System Progression Rules Outcome Type	Suggested Use	Allowable Hold Types and Effect Types	Progression Status When Outcome is Approved
No Penalty	Used when an institution requires a message with no associated penalty for a progression rule failure	No hold type can be set for any outcome type mapped to this system outcome type.	No effect on status
Probation	If an outcome is to result in some type of restriction or requirement placed on the student's enrollment	A hold type must be specified. This hold must have one of the following hold effect types: restricted attendance type, restriction on enrollment to greater than, less than, or equal to given number of credit points, required enrollment in specified unit.	Probation
Manual	Used when the outcome is to be applied manually	No hold type can be set for any outcome type mapped to this system type.	No effect on status

Prerequisites

Person hold types are set up.

Navigation

Academic Records > Progression > Progression Outcome Types

Additional Notes and Business Rules

Progression Rule Outcome Type: Each progression rule outcome type must be unique. After it is used in Oracle Student System, it cannot be deleted.

System Progression Rule Outcome Type: Seeded outcome types are related to the seeded progression status values in academic standing and can be related to specified system hold types.

Positive Outcome: If selected, then system progression outcome type is Award. This check box is automatically updated based on the rule category.

Hold Type: Map user-defined outcome types to user-defined hold types that determine the hold effects to be created when this outcome is applied to a student. Only Academic hold types can be linked to progression rule outcome type. Hold type and system progression rule outcome type cannot be modified, if the current outcomes or hold linked to this progression rule outcome type exist.

Default Restricted Enrollment Credit Points: This field is enabled if the hold type chosen has system hold types which restricts the number of enrolled credit points.

Default Restricted Attendance Type: This field is enabled if the hold type chosen has system hold types which restricts the attendance type and the student can effectively enroll the number of credit points as defined by the attendance type specified.

18.1.5 Setting Up Progression Rule Categories IGSPR001

Enter user-defined progression rule categories and map each category to a system rule call code. You can create user-defined rule categories that are used to group the progression rules of your institution. These categories may be used to differentiate between functionality such as Financial Aid Satisfactory Academic Progress, Dean's List Awards and Honors or Academic Standing rules. The categories are used to override within the hierarchy.

The use of different categories also ensures that when a progression rule is applied, it is not accidentally overridden by another rule specified at a different level in the rule application hierarchy. When the Rule window is used to build rules, only the rule options relevant to this progression measure are available.

A rule category, even when it has associated calendars and outcomes, does not initiate progression checking until it is assigned to a progression application element such as program type, organizational unit, program version, or student program attempt.

Progression calendars and outcomes can be assigned to a progression rule category. In the application of all progression rules within a category, the assigned outcomes and progression periods or dates, as identified through the selected calendars, are used by default. These default progression periods and outcomes can be overridden at the following levels:

Individual rule level, within the category, using the Progression Rules window

Rule application level, using the Progression Outcome Types window

For example, the majority of programs offered at any institution require students to pass one or more specific units in their first year. These units vary from program to program, but the progression outcome of failing one of these units is always **On Probation**. You can establish a rule category of **Unitfail** and assign the progression outcome of **Probation** to the category.

When you define a progression category, you can optionally associate calendars and outcomes with it. When you use this category later in Oracle Student System in a progression rule category, you can choose to not specify outcomes or calendars. The outcomes or calendars defined for the category are used instead.

Navigation

Academic Records > Progression > Progression Rule Category > Progression Rule Category

Program Structure and Planning > Program > Program Types > find a program type > Progression Rule > Progression Rule Application

Additional Notes and Business Rules

Rule Category: After being used, obsolete rule categories cannot be deleted.

Positive Rule: If selected, then rules in the category have positive outcomes.

Applications: Enter the number of times any rule within the category can be applied to a student unless overridden at a rule or rule application level.

18.2 Progression Rules

Set up progression rules.

18.2.1 Setting Up Progression Rules IGSPR006

Progression rules can be set up with progression outcomes and calendars and then used in several different progression rule applications. You can have some standard progression rules, outcomes and calendars which can be maintained in this window and then applied throughout Oracle Student System.

If you have several rules with associated progression outcomes and calendars which may need to be applied for several different program types, organizational units, program version or student unit attempts, it is recommended that you set up general progression rules.

Prerequisites

Progression rule categories are set up.

Calendar types are set up.

Progression outcome types are set up.

Navigation

Academic Records > Progression > Progression Rules

Additional Notes and Business Rules

Rule Category: After being used in Oracle Student System, rule categories cannot be deleted.

Positive Rule: If selected, then rules in the category have positive outcomes.

Applications: Enter the number of times any rule within the category can be applied to a student unless overridden at a rule or rule application level.

Setting Up Progression Rule Summary IGSPR014

Define and link calendars and outcomes to a level in the rule application hierarchy. You must be aware of any calendars and outcomes linked at preceding levels in the hierarchy. If those assigned at a preceding level are appropriate for use at the current level, they can be inherited without creating additional links.

A dynamic prompt appears in each region of the Progression Rule Summary window to indicate the origin of the link to the rule or rule category, whether calendars or outcomes. The possible dynamic prompts include **Rule** and **Category**. If the link is created as part of defining the rule application, the dynamic prompts can include system elements such as **Student**, **Course**, **Org Unit**, or **Program Type**.

Navigation

Academic Records > Progression Rules > Rule Summary > Progression Rule Summary

18.2.2 Setting Up Progression Rule Outcome IGSPR009

Define a progression rule outcome and map it to a rule application at one of the following levels:

Rule category

Rule

Progression rule application

If a progression rule is assessed and failed, the details of the progression outcomes are used to create student progression outcome records. If multiple progression outcome records exist, multiple student progression outcome records are created.

An outcome mapped at the progression rule application level takes precedence over any parent outcomes from the rule or rule category levels. If no outcome exists at the child application level, outcomes are inherited from the parent rule level or from the rule category level.

Existing outcomes mapped at preceding levels in the hierarchy can be viewed in the Rule Summary window. The Rule Summary window can be accessed from either the Progression Rules or Progression Rule Application windows.

Navigation Buttons

The navigation buttons dynamically access the windows. The buttons are active if the context outcome type has the appropriate hold effect type. In each window, you can enter multiple codes for programs, unit sets, or units.

An outcome that affects either exclusion from a unit set or unit or required enrollment in a unit can only be set to apply automatically where at least one unit or unit set code has been recorded.

If the outcome is not set to apply automatically, the following can optionally be selected:

Programs

Unit sets

Unit codes

Note: Progression does not require unit sets and will not be affected if unit sets are not defined.

If programs, unit sets, and unit codes are not entered in this window, they must be entered in the subsequent student progression outcome record before the student progression outcome can be applied. For example, the outcome attached to the progression rule application may not have a unit specified for a required unit outcome. This must be included in the student progression outcome so when you apply the outcome, the enrollment hold record can be created to require this unit.

Prerequisites

Calendar types are set up.

Navigation

Academic Records > Progression > Progression Rules > Progression Outcomes > Progression Rule Outcome

Additional Notes and Business Rules

Accessing the window: If an outcome is defined and mapped to a rule category, access the Progression Rule Outcome window from the Progression Rule Category window. If an outcome is defined and mapped to a progression rule, access the Progression Rule Outcome window from the Progression Rules Applications window.

Duration values: Neither of the duration values can be specified when the progression outcome type is mapped to an Exclusion, Expulsion, or Nopenalty system type. Both duration values must be set where the progression outcome type is mapped to a suspension system type.

Applying outcomes: An outcome with a system hold effect type of exclusion or suspension cannot be applied automatically. An error is displayed when an outcome is set to be applied automatically when program groups, credit points, attendance types, units, or unit set details are not entered completely. A program group code can only be entered for an outcome type with a related system hold type effect of Exclusion from program group. If a program code is not entered and the associated hold effect is program-based the hold will be placed on the student program attempt the rule was tested against.

Restrictions: A restricted attendance type can only be entered for an outcome type with a related system hold type effect of **Restricted Attendance Type**. A restricted enrollment credit points limited to greatest or equal points and enrollment limited to less than or equal credit points.

Failure: Multiple outcomes can be created for each failure number.

Repeat Failure Type: Select **Conscript** if the outcome is failure for the second time or for consecutive progression periods. Select **Repeat** if the outcome is to apply for single or subsequent rule failures in non-consecutive progression periods.

Rank: The highest ranked outcome, which is 1, is the outcome recommended or automatically applied by the system. A rank of 1 is always used for an outcome that has no alternatives. Lower ranked outcomes are selected when a student fails to make progress when reviewed.

Progression Outcome Types: If the progression outcome type is mapped to an exclusion, expulsion, or no penalty system type, then values for outcome duration and outcome duration type cannot be specified.

Outcome Duration: This value determines the number of progression periods for which the outcome is active when applied to a student program attempt. The duration value is required when the progression outcome type is mapped to a suspension system type.

Outcome Duration Type: Select **Normal** for all terms. Select **Effective** for the term student is enrolled.

Apply Automatically: If selected, then an outcome is automatically added to a student program attempt as an approved outcome. If deselected, then a student program attempt is recommended with a decision status of pending that must be approved.

Restricted Attendance Type: A restricted attendance type can only be entered for an outcome type with a related system hold type effect of restricted attendance type.

Restricted Enrollment Credit Point: A restricted enrollment credit points value can only be entered for an outcome type with a related system hold type effect of **Restricted Credit Point**.

Override Appeal: If selected, then appeal is not allowed.

Override Show Cause: If selected, then default configuration settings applicable to a student for this rule and outcome application are overridden. It also indicates that for this outcome, show cause is not allowed.

Positive Outcome: If selected, then positive outcomes are linked to positive hold effects.

Funds: Enter financial funding source for which awarding or disbursement will be placed on hold when outcome is applied.

Excluded Programs: Enter program from which student is excluded when outcome is applied.

Excluded Unit Sets: Enter unit students from which student is excluded when outcome applied.

Excluded/Required Units: Enter units required or excluded based on pass or fail of results.

18.2.3 Rule

You can modify seeded rules or create new rules.

See Chapter 28, "Modifying and Adding Rules" for more information.

18.3 Progression Rule Mapping

Set up progression rule mapping.

18.3.1 Setting Up Progression Rule Applications IGSPR007

Progression rule application is key setup for progression functionality. The progression rule application is made up of key components:

Progression rule: Progress measure which the student is to be tested against

Optional student identifiers: Attendance Type, Max/Min Credit Points and Class Standing are used to further specify the group of students a rule will be applied to. For example, if you can define your rules at program type level and have different rules for graduate and undergraduate students. If you have done this, you can use the attendance type to create separate rules for full time undergraduate students and part time undergraduate students as their progress may be measured differently.

Progression calendars: Calendars that determine when and how many times a student will be evaluated against the progression

Progression outcomes: Punishments or rewards which will result from the progression rule evaluating to true

When a progression rule is evaluated to be true, an outcome is created against the student. For example, a negative rule such as **Academic Progress** could be **Cumulative** with GPA less than 2.00. For a positive rule such as **Dean's List**, the rule could be **Cumulative** with GPA more than 3.75. The progression rule can be

created here using the Edit Rule button or be inherited from the user-defined progression rule.

Progression rule application includes several student identifiers to target particular groups of students within the existing context:

Attendance Type

Minimum Credit Points

Maximum Credit Points

Class Standing

Progression calendars can be inherited by the progression rule application from either the progression rule category or progression rule if they have been defined. Inherited progression calendars are overridden when a progression calendar is defined for the progression rule application.

Progression Outcome details are used by the Progression Rule Application concurrent process to create student progression outcomes. This concurrent process runs the rules against the students and creates the outcomes against them. This process is also performed one student at a time in the Student Progression Rule Check window by clicking the **Manual Rule Check** button.

Progression outcomes can be inherited by the progression rule application from either the progression rule category or progression rule if they have been defined. Inherited progression outcomes are overridden when a progression outcome is defined for the progression rule application.

Progression rules can be applied at a number of levels within a hierarchy. These levels are:

Program Type

Organizational Unit

Program Version

Student Program Attempt

<Context> Region

The <Context> region is configured dynamically based on how the Progression Rule Application window is accessed. Appropriate context details will be displayed in this region for each of the different locations that this window can be accessed. Data displayed in this region cannot be modified. For example, if accessed from the

Program Type window, this region is labelled Program Type and the appropriate Program Type details are displayed.

Prerequisites

Calendar types are set up.

Progression outcome types are set up.

Basic program details are set up.

Basic unit set details are set up.

Basic unit details are set up.

Progression rule categories are set up.

Attendance types are set up.

Navigation

Navigate to the Progression Rule Application window in context of the progression rule application you want to set up.

Additional Notes and Business Rules

CAUTION: To create a progression rule application at a particular level, you must navigate to the Progression Rule Application window in the appropriate context. For example, if you want to set up a progression rule application for a particular program type, you must navigate to the Program Type window in Program Structure and Planning, find the program type you are looking for, and then navigate to the Progression Rule Application window by clicking the Progression Rules button.

Positive Rule: If selected, then positive rules have positive outcomes.

Attendance Type: Enter the attendance type students must have for this progression rule application to be evaluated against them.

Min CP: Enter the minimum number of credit points students must have for this progression rule application to be evaluated against them.

Max CP: Enter the maximum number of credit points students must have for this progression rule application to be evaluated against them.

Class Standing: Enter the class standing value a student must have for this progression rule application to be evaluated against them.

Applications: Enter the number of times any rule within the category can be applied to a student unless it is overridden at a rule or rule application level.

Assigning a Progression Calendar

Progression calendars and outcomes can be assigned to a progression rule. The rule category used in defining a rule can have existing calendar and outcome defaults. Any existing defaults assigned to the category can be viewed in the Progression Rule Categories window.

Apply Limits to a Rule

The following are limits on the application of a rule within a specific calendar.

Start Period: If this rule is to start at a point in the future, a start period is nominated as part of assigning a calendar to the rule. Without this limit, the application of a rule begins when the rule is linked to an application element. Through the use of a start period, a rule can be planned and defined in advance of the period in which it is to start applying.

End Period: This date phases out a defined rule, that is, it has a point at which it is no longer applied, nominate an end period against the assigned calendar. When a rule becomes redundant, an end period value can be entered at any time after the defining of the rule to end-date this rule, within the given calendar type. The rule can still be active under other rule applications that override this end-dating at the rule level. The list of values displays end periods in the same way as start periods, for example, 2002/P1.

Student Start Period: When the rule is applied to a student, this is a number that identifies the student's progression period, during which the application of the rule can begin.

Applications: This is a number that identifies the number of times the rule can be applied to a particular student.

18.3.2 Setting Up Progression Rule Outcome IGSPR009

Set up progression rule outcomes.

See Setting Up Progression Rule Outcome IGSPR009 for more information.

18.3.3 Rule

You can modify seeded rules or create new rules.

See Chapter 28, "Modifying and Adding Rules" for more information.

18.3.4 Applying Progression Rules to Program IGSPS013

Apply progression rules to programs in the Basic Program Details window.

See Chapter 12, "Program Structure and Planning" for more information.

18.4 Progression Rules Options

There are several progression rules options.

Syntax of Statistics Based Rule Options

You can define rules to create user-defined student statistics. Statistic rules can be created for either Cumulative or Period timeframes, for any of the 5 current statistic elements (Earned Credit Points (CP), Attempted Credit Points, Grade Point Average (GPA), Grade Point Average Credit Points or Grade Point Average Quality Points) from any of the user-defined statistic types and using either the more than or less than logical operator.

See Chapter 17, "Records: Academic Statistics" for information about student statistics.

The following are the syntax of statistic based rule options.

Cumulative <Statistic Type> with <Statistic Element> more than <Numeric value>: For a given user-defined statistics type, calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value.

Cumulative <Statistic Type> with <Statistic Element> less than <Numeric value>: For a given user-defined statistics type, calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value.

Period <Statistic Type> with <Statistic Element> more than <Numeric value>: For a given user-defined statistics type, calculate one of the 5 statistic elements and compare this calculated value to the user supplied numeric value.

Period <Statistic Type> with <Statistic Element> less than <Numeric value>: For a given user-defined statistics type, calculate one and compare this calculated value to the user supplied numeric value.

Syntax of Weighted Average Mark Rule Options

Weighted Average Mark rules are created through nominating a rule category mapped to the system rule call code of **PRG-WAM**.

The rule option selected when constructing a (Weighted Average Mark) WAM progression rule determines the type of Weighted Average Mark calculation that is performed as the rule is evaluated. The inclusion/exclusion of student unit attempt outcomes, and the full execution of the calculation, is determined by the type of WAM calculation in the rule option.

The following table describes the syntax of weighted average mark rule options:

Table 18–2 Syntax of Weighted Average Mark Rule Options

Syntax	Description
Program WAM falls below <Numeric value>	Definition: calculates WAM for the whole of a student Program attempt. Unit attempts not included in the calculation: the mark has a null value a recommended mark, not finalized, is recorded. Any unit attempt with the status of Discontin is assigned a mark of 0, where the associated administrative unit status is effectively enrolled for progression. If not, then the unit is not included. Example: Program WAM falls below 60
Program WAM inc Recommended Outcomes falls below <Numeric value>	Definition: calculates WAM for the whole of a student Program attempt. Includes unit attempts in which the mark recorded is a recommended mark in the calculation. Example: Program WAM in Recommended Outcomes falls below 60
Program WAM (except where missing) falls below <Numeric value>	Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has missing marks: no mark is recorded and the outcome has a null value the mark recorded is a recommended mark, not finalized The rule is failed where the calculated WAM falls below a value nominated in defining the rule. Example: Program WAM (except where missing) falls below 60

Table 18–2 (Cont.) Syntax of Weighted Average Mark Rule Options

Syntax	Description
Program WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has missing marks:</p> <ul style="list-style-type: none">no mark is recorded and the outcome has a null valuethe mark recorded is a recommended mark, not finalized <p>Example: Program WAM (except where missing) falls below 60</p>
Program WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM for the whole of a student Program attempt, but does not complete the calculation where any unit attempt has missing marks:</p> <ul style="list-style-type: none">no mark is recorded and the outcome has a null value <p>A recommended mark is not considered a missing mark in this calculation and is used, if a unit attempt has a recommended mark recorded.</p> <p>Example: Program WAM (except where missing) inc Recommended Outcomes falls below 60</p>
Progression period WAM falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. Unit attempts not included in the calculation:</p> <ul style="list-style-type: none">the mark has a null valuea recommended mark, not finalized, is recorded <p>Any unit attempt with the status of Discontin is assigned a mark of 0</p> <p>Example: Period WAM falls below 60</p>
Progression Period WAM inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. Includes in the calculation unit attempts in which the mark recorded is a recommended mark.</p> <p>Example: Period WAM inc Recommended Outcomes falls below 60</p>
Progression Period WAM (except where missing) falls below <Numeric value>	<p>Definition: calculates a WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has missing marks:</p> <ul style="list-style-type: none">no mark is recorded and the outcome has a null valuethe mark recorded is a recommended mark, not finalized <p>Example: Period WAM (except where missing) falls below 60</p>

Table 18–2 (Cont.) Syntax of Weighted Average Mark Rule Options

Syntax	Description
Progression Period WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has missing marks:</p> <p>no mark is recorded and the outcome has a null value</p> <p>the mark recorded is a recommended mark, not finalized</p> <p>Example: Period WAM (except where missing) falls below 60</p>
Progression Period WAM (except where missing) inc Recommended Outcomes falls below <Numeric value>	<p>Definition: calculates WAM value, only considering those student unit attempts that fall within the defined progression period. The calculation is not completed where any unit attempt has missing marks:</p> <p>no mark is recorded and the outcome has a null value</p> <p>A recommended mark is not considered a missing mark in this calculation and is used, where a unit attempt has a recommended mark recorded.</p> <p>Example: Period WAM (except where missing) inc Recommended Outcomes falls below 60</p>

Syntax of Proportional Failure Rule Options

Proportional Failure rules are created through nominating a rule category mapped to the system rule call code of **PRG-PRO** or using **PRG-ALL**. The rule option selected when constructing a proportional failure progression rule determines whether the rule calculations use number of credit points attempted and achieved or number of units attempted and achieved in this student program attempt. Which student unit attempts (in this student program attempt) are included are also determined by the rule option selected.

You can include only those attempted in the current progression period, all attempted in this student program attempt, or those attempted in a specified number of previous progression periods. Certain rule options allow the inclusion of recommended grades in the rule calculation.

The following table describes the syntax of proportional failure rule options:

Table 18–3 Syntax of Proportional Failure Rule Options

Syntax	Description
Fail more than < Numeric value>% CP attempted	<p>Definition: for the whole student Program attempt, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (at the date of the rule evaluation). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted</p>
Fail more than < Numeric value>% Units attempted [inc Recommended Outcomes]	<p>Definition: for the whole student Program attempt, the number of units failed is calculated as a percentage of the number that have been attempted (at the date of the rule evaluation). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted or with qualification: Fail more than 40 % Units inc Recommended Outcomes</p>
Fail more than < Numeric value>% CP attempted in current progression period	<p>Definition: for the current progression period only, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (in this progression period). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted in current progression period</p>
Fail more than < Numeric value>% Units attempted in current progression period [inc Recommended Outcomes]	<p>Definition: for the current progression period, the number of units failed is calculated as a percentage of the number that has been attempted (in this progression period). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted in current progression period or with qualification: Fail more than 40 % Units in current progression period inc Recommended Outcomes</p>

Table 18–3 (Cont.) Syntax of Proportional Failure Rule Options

Syntax	Description
Fail more than < Numeric value>% CP attempted in previous <Numeric value> progression periods	<p>Definition: for the nominated number of previous progression periods, the number of Credit Points failed is calculated as a percentage of the number which have been attempted (over those progression periods). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule.</p> <p>Example: Fail more than 50 % CP attempted in previous 2 progression periods</p>
Fail more than < Numeric value>% Units attempted in previous <Numeric value> progression periods [inc Recommended Outcomes]	<p>Definition: for the nominated number of previous progression periods, the number of units failed is calculated as a percentage of the number which have been attempted (over those progression periods). Where the resulting % value is higher than the % nominated in the rule, the student fails this progression rule. This can be qualified to include recommended results in the calculation.</p> <p>Example: Fail more than 50 % Units attempted in previous 2 progression periods or with qualification: Fail more than 40 % Units in previous 2 progression periods inc Recommended Outcomes</p>

Syntax of Unit Failure Rule Options

Unit failure rules are created through nominating a rule category mapped to the system rule call code of **PRG-UFail** or **PRG-ALL**.

The rule option selected when constructing a unit failure progression rule determines which student unit attempt results are evaluated (all attempted in this student program attempt or only those matching/other than a list of designated units).

The following table describes the syntax of unit failure rule options:

Table 18–4 Syntax of Unit Failure Rule Options

Syntax	Description
Fail any unit <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a student program attempt record contains failed unit attempts, these unit failures are evaluated to check if any single unit has been failed the nominated number of times. Where true, the student fails this progression rule. This can be qualified to include recommended unit results in the calculation.</p> <p>Example: Fail any unit 2 times or with qualification fail any unit 3 times in recommended outcomes</p>
Fail any (I/W) unit <Numeric value> times	<p>Definition: where a student has failed unit attempts (in this Program or others), these unit failures are evaluated to check if any single unit has been failed the nominated number of times. Where true, the student fails this progression rule.</p> <p>Example: Fail any unit 2 times</p>
Fail designated units {Unit Code}[inc Recommended Outcomes]	<p>Definition: where a student program attempt contains failed unit attempts in any of the units listed inside the braces {}, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific versions by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail designated units {EXP201, EXP202, EXP301, EXP302, EXP401, EXP402} or with qualification fail designated units {EXP201, EXP202} inc recommended outcomes</p>
Fail designated (I/W) units {Unit Code}	<p>Definition: where a student program attempt contains failed unit attempts in any of the units listed inside the braces {}, whether in this program or not, the progression rule is failed. The unit codes can be limited to specific versions by using a separator between the unit code and version number, FOR EXAMPLE, SRP161.2</p> <p>Example: Fail designated (I/W) unit(s) {EXP201, EXP202, EXP301, EXP302, EXP401, EXP402}</p>
Fail designated (I/W) units {Unit Codes} at least <Numeric value> times	<p>Definition: where a student has failed unit attempts (in this or other programs), these unit failures are evaluated to check if any match the unit codes listed. If true, has there been the nominated number of failures recorded for that unit code (or more). Where true, the student fails this progression rule.</p> <p>Example: Fail one of {EXP201, EXP202} more than 2 times</p>

Table 18–4 (Cont.) Syntax of Unit Failure Rule Options

Syntax	Description
Fail designated units not in {Unit Code} [inc Recommended Outcomes]	<p>Definition: where a student program attempt contains any failed unit attempts other than those listed inside the braces{}, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific version by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail designated units not in {SEM317, SEM334, SEM225} or with qualification Fail designated unit(s) {SEM317, SEM334} inc Recommended Outcomes</p>
Fail one of {Unit Codes} at least <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a student program attempt contains failed unit attempts, these unit failures are evaluated to check if any match the unit codes listed. If true, has there been the nominated number of failures recorded for that unit code (or more), in this student program attempt. Where true, the student fails this progression rule. This can be qualified to include recommended unit results in the calculation.</p> <p>Example: Fail one of {EXP201, EXP202} more than 2 times or with qualification Fail one of {EXP201, EXP202} more than 2 times inc Recommended Outcomes</p>
Fail units not in {Unit Code} at least <Numeric value> times [inc Recommended Outcomes]	<p>Definition: where a student program attempt contains any failed unit attempts other than those listed inside the braces{}, the number of times a unit has been failed is evaluated. Where the number of failures is equal to or greater than the numeric value entered, the progression rule is failed. This can be qualified to include recommended unit results in the calculation. The unit codes can be limited to specific version by using a separator between the unit code and version number, for example, SRP161.2</p> <p>Example: Fail units not in {AAM261} more than 2 times or with qualification Fail units not in {AAM261} more than 2 times inc Recommended Outcomes</p>

Syntax of Research Milestone Rule Options

Research Milestone rules are created through nominating a rule category mapped to the system rule call code of **PRG-MLS** or **PRG-ALL**.

The rule option selected when constructing a research milestone progression rule determines the Milestone Status evaluated (either a status of **Failed** or any status other than **Achieved**). Rule options can also limit the evaluation to specified milestones and/ or a nominated number of times that a milestone type can have a status of **Failed** recorded.

The following table describes the syntax of research milestone rule options.

Table 18–5 Syntax of Research Milestone Rule Options

Syntax	Description
Fail any milestone	<p>Definition: Where a research candidate has any milestone type with a milestone status of Failed, he/she fails this progression rule.</p> <p>Example: Fail any milestone</p>
Fail any milestone more than <Numeric Value> times	<p>Definition: This rule is failed where a research candidate has the nominated number of instances of a milestone type with the milestone status of Failed.</p> <p>Example: Fail any milestone more than 1 times. A candidate may have the following set of Milestone Types and statuses: 6MONTH/Failed, 12MONTH/Achieved, 6MONTH/Failed, 12MONTH/Planned, PRE-SUB/Planned. This candidate would fail this progression rule. A second candidate with the set: 6MONTH/Failed, 12MONTH/Achieved, 6MONTH/Planned, 12MONTH/Planned, PRE-SUB/Planned; would not fail the rule.</p>
Fail one of {Milestone Type} [more than <Numeric Value> times]	<p>Definition: Where a research candidate has one of the nominated milestone types (listed in braces {}) with a milestone status of Failed the progression rule is failed. This can be further qualified to consider the number of instances that one of the listed milestone types has a FAILED status.</p> <p>Example: Fail one of {6MONTH, 12MONTH, PRE-SUB} Fail one of {6MONTH, 12MONTH, PRE-SUB} more than 2 times</p>
Fail to achieve {Milestone Type}	<p>Definition: This rule is failed when a research candidate has a milestone (one of the types listed inside braces {}), matching both conditions. The milestone's Due Date is later than the start date of the current progression period and earlier than the current date. The milestone has a status of Planned.</p> <p>Example: Fail to achieve {6MONTH, 12MONTH}</p>
Fail to achieve any milestone	<p>Definition: This rule is failed where a research candidate has any milestone matching both conditions. The milestone's Due Date is later than the start date of the current progression period and earlier than the current date The milestone has a status of Planned.</p> <p>Example: Fail to achieve any milestone</p>

Syntax of Grading Options

Grading rules are created through nominating a rule category mapped to the system rule call code of **PRG-ALL**.

The rule option selected when constructing a grading progression rule determines which grades are used to evaluate progress. Typically the grading rules are used in conjunction with other rule measures. Grades are designated using the grading schema/grade format.

The following table describes the syntax of grading options.

Table 18–6 Syntax of Grading Options

Syntax	Description
More than <numeric value>% attempted Credit Points of <grades>	<p>Definition: The percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted CP of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value>% attempted Credit Point of <grades> in current period	<p>Definition: For the current progression period, the percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted CP of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
More than <numeric value>% attempted units of <grades>	<p>Definition: The percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value>% attempted units of <grades> in current period	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is greater than the percent indicated, the student fails the rule.</p> <p>Example: More than 35% attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>

Table 18–6 (Cont.) Syntax of Grading Options

Syntax	Description
More than <numeric value> attempted Credit Points of <grades>	<p>Definition: The number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value> attempted Credit Points of <grades> in current period	<p>Definition: In the current progression period, the number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
More than <numeric value> attempted units of <grades>	<p>Definition: The number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F}</p>
More than <numeric value> attempted units of <grades> in current period	<p>Definition: For the current progression period, the number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is greater than the number indicated, the student fails the rule.</p> <p>Example: More than 6 attempted units of grades {STANDARD/C, STANDARD/D, STANDARD/F} in current period</p>
Less than <numeric value>% attempted Credit Points of <grades>	<p>Definition: The percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted CP of grades {STANDARD/A, STANDARD/B, STANDARD/C}</p>

Table 18–6 (Cont.) Syntax of Grading Options

Syntax	Description
Less than <numeric value>% attempted Credit Point of <grades> in current period	<p>Definition: For the current progression period, the percent of credit points for which the student earns the designated grades is calculated. If the percent of credit points of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 35% attempted CP of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value>% attempted units of <grades>	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value>% attempted units of <grades> in current period	<p>Definition: For the current progression period, the percent of units for which the student earns the designated grades is calculated. If the percent of units of the specific grades is less than the percent indicated, the student fails the rule.</p> <p>Example: Less than 55% attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>
Less than <numeric value> attempted Credit Points of <grades>	<p>Definition: The number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 8 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C}</p>
Less than <numeric value> attempted Credit Points of <grades> in current period	<p>Definition: In the current progression period, the number of credit points for which the student earns the designated grades is calculated. If the number of credit point of the specific grades is less than the number indicated, the student fails the rule.</p> <p>Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C} in current period</p>

Table 18–6 (Cont.) Syntax of Grading Options

Syntax	Description
Less than <numeric value> attempted units of <grades>	Definition: The number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is less than the number indicated, the student fails the rule. Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B, STANDARD/C}
Less than <numeric value> attempted units of <grades> in current period	Definition: For the current progression period, the number of units for which the student earns the designated grades is calculated. If the number of units of the specific grades is less than the number indicated, the student fails the rule. Example: Less than 6 attempted units of grades {STANDARD/A, STANDARD/B} in current period

18.4.1 Calculations

The following are terms used to measure progress as a student’s progress is tracked.

Achievable credit points: Number of unit’s credit points that count toward student’s enrollment; if an override credit point value is set for a student unit attempt, override value is used; total value of achievable credit points used for GPA and WAM.

Grade point average (GPA): Calculated value used to measure a student’s progress by averaging the grades a student receives, taking into account the total study load.

Grade GPA value: Value specified for each grade when defining an institution’s grading schema.

Weighted average mark (WAM): Calculated value used to measure a student’s progress in a program attempt.

Numeric mark value: Value recorded as the assessment outcome for each unit a student studies.

WAM weighting value: Derived from one of the following values:

Value assigned to a unit when a unit level is entered; can be weighted differently by unit level, for example, an undergraduate degree program can have a lower weighting value than a unit designed to be studied in final year of same program

Value assigned to a unit internal program level; a program level value can be assigned to a unit that weights the unit based on program level at which unit is designed to be studied; for example, a standard first year undergraduate unit can

have a unit internal course level of 1, but if that unit is taken by a student enrolled in a Master's degree program, the low unit internal program level results in a lower WAM value for that student.

Priority for WAM weighting value is as follows:

First: Unit internal program level value

Second: Unit level value

Third: Value of 1

Show cause: If a student makes a submission related to a progression outcome before the outcome is applied, following details about submission can be viewed and recorded:

Expiration date

Date of show cause

Date of show cause outcome

Show cause outcome type

Date of show cause: Date when show cause submitted by student.

Date of show cause outcome: Date on which decision about show cause outcome is made.

Show cause outcome type: Result of show cause hearing; either upheld or dismissed.

Appeal: Request to vacate decision after outcome is applied. If a student lodges an appeal against a progression outcome, the following details about the appeal are recorded:

Expiration date

Date of appeal

Date of appeal outcome

Date of appeal: Date when appeal lodged by student.

Date of appeal outcome: Date when decision about outcome is made.

Appeal outcome type: Result of appeal hearing; either upheld or dismissed.

Progression rule outcome type: User-defined code that defines an outcome that can be linked to a progression rule.

Encumbrance end date: Expiration date for encumbrances that are due to expire within the related progression period. A data alias must be nominated to represent the encumbrance end date in the system-wide progression configuration. If no encumbrance end date alias exists, the calendar end date is used.

Weighted Average Mark Calculation

The standard formula for calculating a student's WAM is as follows:

$$\text{WAM} = \text{total WAM achieved} / \text{total achievable WAM}$$

The total WAM achieved is calculated from the results saved against each unit in a student's program attempt. The standard formula for calculating a student's total WAM achieved is as follows:

$$\text{total WAM achieved} = \text{achievable credit points} * \text{WAM weighting} * \text{numeric mark}$$

The total achievable WAM is calculated from the basic unit details saved against each unit. The standard formula for calculating total achievable WAM for each unit is as follows:

$$\text{total achievable WAM} = \text{achievable credit points} * \text{WAM weighting}$$

18.4.1.0.1 Unit Level WAM The following is an example of calculating unit level WAM weighting.

Three units have the unit level WAM weighting values as follows:

ABG271

- Achievable Credit Points Value = 2
- Unit Level WAM Weight Value =2.00

ASC238

- Achievable Credit Points Value = 1
- Unit Level WAM Weight Value =2.00

HD0101

- Achievable Credit Points Value = 4
- Unit Level WAM Weight Value =9.00

The calculation for the unit level WAM is as follows:

$$= 3,334 / 42$$

$$\text{unit level WAM} = 79.381$$

18.4.1.0.2 Unit Internal Program Level WAM

The following guidelines apply when calculating the WAM:

- The inclusion or exclusion of student unit attempt outcomes and the full execution of the calculation is determined by the type of WAM calculation.
- The inclusion or exclusion of discontinued student unit attempts is determined by the associated administrative unit status. A discontinued unit is only included in the calculation if the Effectively Enrolled for Progression Indicator is set for that unit.

WAM values are stored if the configuration parameter **Calculate Weighted Average Mark** check box is selected at the configuration level applicable to one of the following student program attempts:

- System
- Organizational unit
- Program version configuration
- WAM values are saved with data that identifies the progression period in which it was calculated. Only program WAM and progression period WAM values can be saved. Therefore, the resulting value from calculations that include recommended marks cannot be saved.

18.4.2 Calculating Show Cause or Appeal Expiration Dates

If progression rules are applied in a configuration that allows a student to show cause or appeal, the date by which that student must show cause or lodge an appeal is calculated. The calculation uses the following values:

- Show cause or appeal length value from the configuration level that applies to this student
- Show cause or appeal cutoff date alias instance from the applicable progression calendar
- Date when progression outcome was approved

The standard formula for calculating the expiration date for show cause or appeal expiration dates is as follows:

expiration date = outcome approval date + show cause or appeal length value

If the expiration date is later than the show cause or appeal cut off date alias instance, the expiration date is set to the cut off date alias instance, which is a future date.

18.4.2.1 Calculating Expiration Dates

Progression outcome and encumbrance expiration dates can only be derived if the duration and duration type are defined as part of the student progression outcome. Only outcomes with the following system progression rule outcome types can have a duration or duration type:

- Suspension
- Probation
- Manual

Therefore, only these outcomes can have derived expiration dates for outcome and the associated encumbrance.

The progression outcome and encumbrance expiration dates calculation requires the existence of instances of future progression calendars of the same stream number as the progression calendar in which the outcome was applied. At least the same number of instances must exist as the number entered for the duration of the progression outcome. The instance for the identified progression calendar of the Encumb End Date Alias, which is set in the system-wide configuration, is saved as the expiration date. If no instance of this date alias exists in the existing progression calendar, the end date of that progression calendar is used.

The standard formula for calculating the progression outcome and encumbrance expiration dates is as follows:

- If duration type is **Normal**, expiration date is Encumb End Date Alias for the n^{th} future progression calendar instance where n equals duration
- If duration type is **Effective**, expiration date is Encumb End Date Alias instance for the n^{th} future progression calendar instance in which student had a student unit attempt with status **Enrolled**, **Completed**, or **Discontin** saved in a subordinate teaching period
- If required calendars do not exist, expiration dates are not recorded and the batch maintenance process derives the dates as soon as possible after the calendar instance is created

Some progression outcomes and their associated encumbrances cannot have a duration or a duration type specified, and therefore cannot have a derived expiration date. These are outcomes of the following system progression rule outcome types:

- Exclusion
- Expulsion

- Nopenalty

The preceding system progression rule outcome types must be manually ended in one of the following ways:

- A decision status **Cancelled** can be entered for the outcome. When this change to decision status is applied, the system date is entered as the expiration date for the student progression outcome and associated encumbrance and encumbrance effects.
- An outcome can have the expiration date manually set to enable ending an outcome without changing the decision status. This can be done to end one of the outcome types that cannot have duration details recorded. It can also be used to expire a current outcome to allow the application of another incompatible outcome. For example, a student who currently has an applied **Probation** outcome cannot have an **Exclusion** outcome added until the existing probation expires.

Note: Any outcome can be manually set to expire by overriding a derived expiration date if the user has the required authority.

Records: Assessments

19.1 Assessments

You can manage the academic assessment of students enrolled in units of study by:

- Recording and maintaining assessment items, assessment patterns, grading schema, and related details
- Managing all examination functions in conjunction with an integrated, external timetable generator program, such as timetables, examination materials, examination supervision, and examination locations and venues
- Managing critical assessment related calendars and dates
- Entering and publishing results
- Generating assessment related correspondence
- Entering and managing assignments, assignment due date extensions, and assignment outcomes
- Managing applications for special consideration and their outcomes
- Viewing student lists

Assessments Reference Data

For the Assessments functionality of the Academic Records subsystem to function, reference data must be created and maintained:

Assessment types: Define assessment items in the Assessment Items window

Examination material types: Define examination materials in the Assessment Item Examination Materials window

Assessor types: Define an assessor assigned to an assessment item in the Assessment Items window

Examination locations: Venues and supervisors are attached to locations. This is required for examination management

Venues: Supervisors are assigned to venues and examinations are scheduled at venues. This is required for examination management.

Assessment item variation cutoff date alias: Prevents changes to unit assessment items after a specified date. A nominal date can be used if the function is not required. See the Assessment Calendar Configuration window for details about setting up other date aliases.

Special consideration category: Categorizes special consideration applications in the Special Consideration Application Details window. This is required for special consideration functions.

Special consideration outcome: Enter final outcomes in the Special Consideration Application Details window. This is required for special consideration functions.

Supervisor types: Categorize supervisors in the Examination Supervisor Details window.

Result entry configuration: Control the entry of student unit attempt outcomes during both manual and electronic uploading of results. This is required for electronic upload of results.

Tracking types: Define tracking items. A tracking type can be mapped to the system-defined tracking type Assignment. This is required for assignment tracking items in the Initiate a Tracking Item for Assignments concurrent process.

Attendance: Set up unit attendance entries by specifying options such as attendance hours, invalid hours, and claimable hours.

Anonymous grading configuration: Set up Oracle Student System to assign numbers to assessment items instead of students' names for anonymous grading.

19.2 Oracle Web Applications Desktop Integrator

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

Oracle Web Applications Desktop Integrator 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 Applications Desktop Integrator integrates with Oracle Student System self-service pages seamlessly. There are no steps that you must complete.

19.3 Attendance

There are two types of Attendance that you can record: the number of hours attended in total for each student in a unit section, and the attendance of students at particular session at specific dates, times and locations.

Attendance details are entered in self-service:

- Attendance is validated
- Attendance hours are entered

Claimable Hours

Actual hours of attendance for each student are reported for unit sections you identify. You can select the **Attendance Required** check box in the Unit Section Details window at the unit section level to determine attendance requirements. Furthermore, a lead instructor needs to be selected for the unit section and Claimable hours must be defined at the unit level that are defaulted at the unit section level.

Attendance rosters are produced in self-service for each unit section, and instructors assign actual hours of attendees for each student enrolled in the unit section. You can then report this information in order to claim funding for the unit section.

Session Based Attendance

Multiple sessions can be defined for a unit section. These sessions can be related to an occurrence or can be ad hoc. Sessions can be created against a unit section and the students can then be marked as attended, not attended, or not applicable. Sessions can also be created from a separate student-based navigation.

19.3.1 Setting Up Attendance Entry Configuration IGSAS033

Configure unit attendance entries. You can specify unit attendance entries based on options such as attendance hours, invalid hours, and claimable hours. The information entered in this window is used to configure student's attendance.

Navigation

Academic Records > Attendance > Setup > Attendance Entry Configuration Setup > Attendance Entry Configuration

Additional Notes and Business Rules

Attendance Entry Mandatory: If selected, then attendance entry is required for each student for each unit section marked for attendance entry.

Student Unit Discontinued: If Collect Hours is selected, hours are counted for attendance even for discontinued units.

Student Hours Exist: Enter claimable existing attendance hours.

19.3.2 Setting Up Unit Credit Points and Hours - Claimable Hours IGSPS047

Enter claimable hours. This information is required to enable self-service functionality.

Prerequisites

Basic unit details are set up.

Navigation

Program Structure and Planning > Basic Unit Details > Other Unit Details > Unit Credit Points and Hours > Unit Credit Points and Hours

19.3.3 Setting Up Unit Section Credit Points - Claimable Hours IGSPS086

Claimable hours must be defined to enable self-service functionality.

Prerequisites

Unit section details are set up.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Credit Points > Unit Section Credit Points

19.4 Grading Schemas

Grading schemas represent grades earned by students based on the schema you set up. Grading schemas can be associated with units at the unit section level or at student unit attempt level. While evaluating the grade of the student, Oracle Student System looks for the grading schema set up for unit attempts. If a grading schema is not set up for students' unit attempts, then Oracle Student System checks the unit section level. If a grading schema not set up at the unit section level, Oracle Student System checks the unit level.

Grading Schema Types

A grading schema must have only one system grading schema type. If the same grading schema is used for a unit in addition to unit assessment items, duplicate schemas must be created and assigned a unique grading schema type. Grading schemas assigned to a type are only available to the associated functionality.

Grading schemas are separated by system type. These types include the following:

- Programs and units
- Assessment items
- Secondary and tertiary award

For information on secondary and tertiary awards, see *Oracle Student System for the United Kingdom User Guide*.

Grading Schemas and Units

The need to create new schema or new versions of existing schema is determined by your institutional business practices. Grading schema are linked to unit offering options in the Maintain Unit Offering Options window.

Grading Schemas and Assessment Item

Grading schemas for assessment items must be created before assessment items are created. Assessment item grading schemas can be for grades only or a combination of marks and grades.

Assessment item grading schemas must be of the type **Assessment Item**, and all assessment items must be assigned a grading schema.

You can create grading schemas, assign the grading schema to assessment items, and grade the assessment items. Students can view the assessment item outcomes through self-service, and administrative users can view assessment item outcomes through the Assessment Item Outcome History window and through self-service.

The assessment items with a grading schema attached are then marked or graded, and the mark or grade is submitted to the database. You can view the mark or grade received for the assessment items for each student unit attempt.

Set up the following to enable self-service grading:

- Anonymous grading
- Grading schemas
- Incomplete grade conversion system profile
- Assessment Calendar Configuration
- Lead instructor should be in place
- Student unit attempts are defined
- Grade translations

Grade Rosters

Grade rosters are produced in self-service for each unit section, and instructors assign a grade for each student enrolled in the unit section and submit midterm, early final, or final grades that are applied to each student's record. Self-Service Grade rosters behaviors is dependent on mark grade entry configuration.

Grade rosters enable instructors to submit valid grades for all or some students enrolled. Instructors are notified of rosters through a workflow process (if Oracle Workflow is installed), asked to enter grades, and allowed to submit grades directly to the database after verification.

Notifications

Through the Generate Assessment Notifications concurrent process, you can configure a reminder process through workflow which will be sent to instructors.

The following are sample notifications to the lead instructors:

- **Midterm Advance Notice:** Send a notification to the instructor informing that the Midterm period is expected to start on a particular date.

- **Midterm Start:** Send a notification to instructor reminding that the Midterm assessment period has begun.
- **Midterm End:** Send a notification to instructor informing that the Midterm assessment period has ended and have not submitted their grades.

You can configure a notification routing workflow that is triggered when final and mid grades are submitted. User-defined persons are notified when grades are submitted.

19.4.1 Setting Up Grading Schemas IGSAS025

Grading schemas are created to define acceptable grade sets such as A,B,C,D and 1,2,3,4. Students can elect a grading schema at the time of enrollment, depending on the your policies and setup.

For each grading schema, define valid grades that can be submitted by an instructor. Grading schemas that reflect letter grades, numeric marks, or pass/fail evaluations are established and assigned to unit sections.

Multiple grading schemas can be assigned to a specific unit section. In this case, students can select a grading schema at the time of enrollment.

If a unit or unit section has more than one grading schema associated with it, the student can elect one of the grading schemas at the time of enrollment.

You should ensure that grade translation mappings are in place for any non-default grading schema grades with the corresponding grades of the default grading schema for the unit or unit section.

Grading schemas are used by the manual entry result and electronic upload procedures to determine the grades that can be applied to student unit attempts.

Grading schemas are attached to:

- Units in the Unit Grading Schemas window, accessed from Basic Unit Details window
- Unit sections in the Unit Section Grading Schemas window, accessed from Unit Sections window
- Assessment items in a unit in the Unit Assessment Items window accessed through
- Assessment items in a unit section in the Unit Section Assessment Items window accessed through

You can specify if grades of a grading schema are to be published on noticeboards, transcripts, files, or newspapers.

Note: A grading schema must be defined for each of the qualification types included in the calculation of the UCAS tariff and the HESA highest qualification on entry. The UCAS tariff associated with a particular grading schema grade should be recorded as the grade rank.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas

Additional Notes and Business Rules

UK Only Functionality: Disabled when Grading Schema Type is Honors Levels Grading Schema:

- Grade Translations Button
- Grade Point Average Value
- External Grade
- Grading Period
- Repeat Grade to Report
- Special Grade Type
- Earned Credit Points
- Repeat Processing
- Nominal Percentage Grade Distribution – Minimum
- Nominal Percentage Grade Distribution – Minimum
- Administrator Only
- System Assigned
- Default Outstanding Grade
- **Honors Levels:** Honors levels become the award grade, and the full grade name becomes the honors level that is displayed.
- **Marks range:** Marks range becomes the bands or ranges within the honors distinctions fall.

- **Querying:** When querying for an honors level, grade inclusion values are checked for:
 - **Transcript:** Honors level (Full Grade Name) is not displayed when the **Official Transcript** check box is not selected.
 - **View Academic History:** Honors level (Full Grade Name) is not displayed when the **Internal Documents** check box is not selected.

Version Number: This field is automatically updated when you save your record. If there are several versions of a particular grading schema, only one can have no end date.

Effective Dates: Enter the date range for the grading schema. If there are several versions of a particular grading schema, the date ranges cannot overlap.

Grade: Grades cannot be added to a grading schema that does not have a current or future date range.

Marks Range Lower and Marks Range Upper: The mark ranges for different grades within the schema cannot overlap. If either the upper or lower mark range is set, both lower and upper range must be set.

Grade Rank: Each grade must have a unique rank. The value of order can be from 0 to 999. The order must be assigned so that 0 equals the highest grade, 2 equals the next highest grade, and so on. Grade rank is also used in progression rules.

Repeat Grade to Report: Valid values for this field are grades in the parent grading schema and grades for which the Repeat Processing check box is set.

Special Grade Type: Enter the special grade types associated with grade:

- **Conceded-Pass:** Passes the student for the unit attempt irrespective of result
- **Special-Exam:** Identifies students for special or deferred examinations sending their details to the exam scheduling interface
- **Supp-Exam:** Identifies students for supplementary examinations, or replaceable grade granted for a student unit attempt which can be later replaced. A replaceable grade can be given when the student takes the unit at a location different from the usual one and is therefore assessed by an assessor who does not know the student.

Official Transcript: If selected, then unit attempt with this grade is included on printed official transcript.

Earned Credit Points: If selected, then unit attempt with this grade is included in calculations of earned credit points in academic statistics

Repeat Processing: If selected, then unit attempt with this grade is included in calculation of maximum number of repeat attempts of a Unit

Minimum: This field is the minimum percentage of students that achieve a certain grade.

Maximum: This field is the maximum percentage of students that achieve a certain grade.

Administrator Only: If selected, then only the administrator can assign this grade.

System Assigned: If selected, then grades can only be assigned by Oracle Student System, not by users.

Default Outstanding Grade: This check box has no current use.

19.4.2 Setting Up Grading Schema Grade Translations IGSAS026

Map one grading schema to another for grade translations for units. If a student wants to see grades for the unit attempt in a grading schema different from the default grading schema assigned to the unit section, grades can be translated from one grading schema to another.

Students enrolled in a unit section can have a grading schema mapped to their program offering patterns. In this case, if the program grading schema has precedence, a student's grade from the unit grading schema is translated to the grade for the program grading schema.

Unit sections must have a grading schema assigned. However, program offering patterns can also be assigned a grading schema. Outcomes are entered in the context of the unit section grading schema. The student's recorded unit outcome must be translated to the corresponding grade in the program grading schema if a student is enrolled in the unit offering and program and if the unit section **Unit Grading Schema Precedence** check box is not selected. To do this, relationships must be established between grades in the unit grading schema and the program grading schema.

UK Note: To derive the highest qualification on entry, each of the grading schema records for each of the entries, qualifications must be mapped to the relevant HESA highest qualification on entry. For example, an A level grade is mapped to the highest qualification on entry grade of 40.

Prerequisites

Grading schemas are set up.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Grading Schemas > Grade Translations > Grading Schema Grade Translations

19.5 Assessment Items

An assessment item is an activity used to evaluate a student's understanding of a unit of study. For example, a student can be assessed in a unit by submitting a number of assignments, sitting for a written examination, or participating in a practical examination. Each of these requirements is an assessment item.

Each unit has a different set of assessment items associated with it.

Assessment types classify assessment items. A particular assessment item is identified by a system-assigned identification number, along with an assessment type and description.

Assessment items are entered and maintained using the Assessment Items window. Only assessment items used by specific system functionality must be entered. For example, examinations to be scheduled and assignments to be tracked must be entered. Examinations given outside of scheduled examination periods or assignments that are not tracked do not need to be entered.

Note: Special consideration applications for a unit assessment item cannot be processed, nor can the system be used to advise students of all their assessment requirements, unless the assessment item is entered in the system and assigned to a student unit attempt. The complete set of assessment items and patterns should be entered for each unit.

Assessment items can be examinable or nonexaminable. Essays, assignments, theatrical and musical performances, and practical examinations are nonexaminable. Examples of examinable assessment items include multiple choice tests and standardized tests.

The exam timetable functionality can be used only with examinable assessment items. The **Examinable** check box is selected or deselected for each assessment type and the setting is transferred to new assessment items of the same assessment type.

Examinable assessment items can be scheduled or not scheduled. The **Scheduled** check box is selected or deselected for each examinable assessment item. Scheduled items are processed by a timetabling application. Nonscheduled items occur outside the defined examination period and are not processed by a timetabling application.

The following list are additional details that can be entered about each examinable assessment item using navigation buttons in the Assessment Items window. The only additional information that can be entered about nonexaminable assessment items is Assessors.

Comments: Text field for entering comments about an assessment item

Supplied Materials: Text field, list, or both for entering the materials supplied by the institution for an examination

Allowable Materials: Text field, list, or both for entering the materials permitted in an examination

Nonallowable Materials: Text field, list, or both for entering the materials not allowed in an examination

Supervisor Instructions: Text field for entering instructions to examination supervisors of the assessment item

Announcements: Text field for entering announcements to be made before, during, or after an examination

Constraints: Text field for entering constraints

Assessment Program Types: Assessment item is restricted to student units related to program types entered here, such as Postgrad and Ugrad. This assessment item detail is applicable only if a student studies a unit in a program attached to one of these program types.

Assessors: Details about assessors for an assessment item. One assessor is named the primary assessor. Assessors are assigned an assessor type, which allows a person to be entered more than once while performing different assessor type roles. The role of an assessor can be refined, or restricted, to the unit offering option level.

When a student enrolls in a particular unit of study and the Automatically Maintain Student Unit Attempt Assessment Items concurrent process is run, the student inherits the default assessment items associated with the unit. When a default assessment item is attached to a unit after students have enrolled in it, the Apply Unit Assessment Item Modification to Students concurrent process assigns the assessment item to student units.

In the Assessment Item window, you can enter assessment item examination materials that are allowed, disallowed, and supplied for examinations. This information is used to manage the supply of examination materials to students and to advise supervisors and students of material that can or cannot be taken in to examinations.

19.5.1 Setting Up Assessment Types IGSAS001

A user-defined assessment type is a means of classifying assessment items. An assessment item is assigned to each assessment item in order to classify the item. Assessment types can be either examinable or non-examinable and can be mapped to a system assessment type. Assessment types are used in the definition of an assessment item.

Different sets of data are collected for examinable and nonexaminable types and different processes are applied to them. For example, examinable items can be passed to the examination timetable scheduling process.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Types

Additional Notes and Business Rules

Examinable: If selected, then assessment type is examinable.

Anonymous Grading: If this check box selected, then anonymous grading is enabled.

System Assessment Type: Assessment items are recognized for assignment tracking purposes only if they are of an assessment type mapped to the system assessment type of Assignment.

19.5.2 Setting Up Examination Material Types IGSAS003

Examination material types are items that can be supplied to students appearing for examinations. Students can or cannot be allowed to take the items into the examinations.

Define supplied, allowed, and not-allowed material types. Examples of examination material types are calculators, notes, dictionaries, text books, and script books.

Navigation

Academic Record > Assessment > Setup > Examination Timetable > Examination Material Types

19.5.3 Setting Up Assessor Types IGSAS004

Enter user-defined assessment assessor types. An assessor is a person who reviews student assessment items or who has a role related to the assessment of students. Assessor type is a means of classifying assessors. Examples include marker, tutor, and unit-chair.

When a new unit assessment item is created, Oracle Student System automatically creates an assessor. The default assessor type must be assigned to the assessor and can be altered.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessor Types

19.5.4 Setting Up Approved Assessment Item Grading Schema IGSAS037

Use this window if you need to restrict an assessment item to a limited set of grading schemas.

Prerequisites

Unit details are set up.

Grading schemas are set up.

Assessment types are set up.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Approved Assessment Items Grading Schema

Additional Notes and Business Rules

Assigning grading schemas to assessment items: At least one grading schema type of assessment item must be created. Assessment item grading schemas must be of the system grading schema type **Assessment Item**. All assessment items must be assigned a grading schema. Assessment items within a unit can have different grading schemas.

Version Number: If there are several versions of a particular grading scheme, only one version of the grading schema can have no end date.

Default: If selected, then grading schema is automatically assigned to any new assessment item that is created.

19.5.5 Setting Up Assessment Items IGSAS009

Enter examinable or non-examinable materials for assessment items. For assessment items to be associated with students, they must first be created. Assessment items are created directly through unit offering patterns using the Unit Assessment Items window, and are inherited by students during enrolling in a unit. Assessment items can also be created as standalone items using this window and linked to one or more unit offering patterns.

Assessment items are identified by a unique ID and categorized by assigning a user-defined assessment type. An assessment type determines if the assessment item is examinable or non-examinable and affects the configuration of the window. Different sets of data are collected and different processes assigned for examinable and non-examinable assessment items.

The **Program Types** button opens the Assessment Program Type region in which program types are associated with the selected assessment item. Associating a program type restricts the application of the assessment item to student unit attempts within the specified program type only.

The **Assessors** button opens the Assessment Item Assessor region in which assessors are associated with the selected assessment item. Assessors are designated an assessor type. The same assessor can be associated with an assessment item more than once. For example, an assessor can exist as a marker for an assessment item at Location X and also as a marker at Location Y, but not Location Z.

The **Assessment Item Examination Material** button opens Assessment Item Examination Materials window.

Prerequisites

Basic person details (assessors) are created.

Assessment types are set up.

Examination material types are set up.

Assessor types are set up.

Organizational units are set up.

Program types are set up.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Items

Additional Notes and Business Rules

Dates: The unit assessment item due date must be within the unit section effective date.

Assessment ID: The assessment ID is inserted when a record is saved.

Assessment Type: If the assessment type is a nonexaminable item such as Assignment, only Comments tab and Assessor button are enabled in the Examination/Non-Examination Details region. After a non-examinable assessment item is used in Oracle Student System, it cannot be changed to an examinable assessment item.

Description: If an examinable assessment item is created through the Unit Assessment Items window the description is defaulted from the unit title.

Anonymous Grading: If selected, then anonymous grading is enabled.

Examinable: If selected, then assessment item is examinable.

Short Paper Name: If an examinable assessment item is created through the Unit Assessment Items window, the short paper name is defaulted from the unit title.

Paper Name: If an examinable assessment item is created through the Unit Assessment Items window, the paper name is defaulted from the unit title.

Scheduled: If selected, then examinable assessment item is included in the examination timetable.

Primary Assessor: If selected, then assessor is the responsible senior assessor for the assessment item. It is recommended that a primary assessor be assigned to each assessment item.

Item Limit: Enter the maximum number of assessment items that can be assigned to an assessor.

19.5.6 Setting Up Assessment Item Examination Materials IGSAS010

Enter materials that are allowed, disallowed, and supplied for examinations. This information is used to manage the supply of examination materials to students and to advise supervisors and students of material that can or can not be taken in to examinations.

Map examination material types to assessment items.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Items > Assessment Item Examination Materials > Assessment Item Examination Materials

Additional Notes and Business Rules

Scheduled: If selected, then examinable assessment item is included in the examination timetable.

Material Category: Enter material types associated with material category. This field defaults to the context category if the window was entered using one of the list buttons.

Quantity Per Student: Quantity per student can be set only where the system material category is Supplied.

19.5.7 Setting Up Unit Assessment Items IGSAS011

Enter unit assessment items and map them to unit offerings. Unit assessment items are exams, tests, and assignments specific to units.

You can map assessment items to unit offerings by:

- Creating assessment items specifically for a unit
- Create stand-alone assessment items

You can create assessment item groups to make groups of assessment items that are attached to a unit. You can set the default formula, number, and weighting for these user-defined groups of assessment items. This setup can be overridden for students in the Student Unit Assessment Item window.

Example setup for Final Grading Period Assessment Group is as follows:

Group Name: A.I. Reference

Exam: Weighted Average, Weighting = 50

- Exam: EX 1, Mandatory Type = Mandatory, Weighting = 50

Essays: Formula = Best N, Number = 2, Weighting = 30

- Essay: ESS1, Mandatory Type = Optional, Weighting = 50
- Essay: ESS2, Mandatory Type = Optional, Weighting = 50
- Essay: ESS3, Mandatory Type = Optional, Weighting = 50

Practical: Weighted Average, Weighting = 20

- Practical: PRAC1, Mandatory Type = Mandatory, Weighting = 10
- Practical: PRAC2, Mandatory Type = Mandatory, Weighting = 10
- Practical: PRAC3, Mandatory Type = Mandatory Pass, Weighting = 20

Weighting formula example:

- **Best N:** A student must complete all four-essay assessment items for a unit section. The average mark is then calculated using the weighted average of the best three marks.
- **At least N:** This is a slight variation **Best N**, where there might be a requirement to complete a minimum of three out of the four essays but a student could choose to do all four. If a student did three the average would be calculated as a weighted average of the three, if the student chose to do all four the average would be calculated as a weighted average of all four. The algorithm would be different to **Best N** in that the calculation may or may not need to include the worst mark.

You can also enter details for individual unit assessment items. For examinable items, the reference must be unique for each item and must be the same in each record if a particular assessment item is associated with a different unit section of the same unit offering pattern, including deleted items.

If the teaching period spans multiple instances of an examination calendar type, for example, a teaching period that starts in semester 1 of one year and ends in semester 1 of the following year, then specify the examination calendar instance to which the assessment is related.

When a new version of a unit is created, the unit can be rolled over. All associated details including assessment items are copied into the new version.

Prerequisites

Calendar types are set up.

Locations are set up.

Unit modes are set up.

Unit classes are set up.

Basic unit details are set up.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Unit Assessment Item

Additional Notes and Business Rules

Mapping: An assessment item:

- Can be mapped to unit sections only if the unit version is **Active**
- Can be mapped to a unit section more than once
- Cannot be mapped to a unit section and be restricted to different unit sections. For example, a unit with Location X cannot have an assessment item restricted to Location Y

Restrictions: An assessment item:

- Cannot be unrestricted and later restricted, nor can it be restricted and later unrestricted.
- Cannot be restricted on both unit mode and unit class mode in the same restriction. An assessment item can have restrictions on the same location, but unit mode or unit class must differ, and they should not overlap.
- Cannot be restricted to a particular location, mode, or unit class that differs from the restrictions applied to the pattern. Either the assessment pattern must be modified or the assessment item must be removed from the assessment pattern.
- Cannot be entered twice with the same details.

Deletion: An assessment item cannot be deleted.

Unit Assessment Item Groups Region

Group Name: Enter a unique assessment item group name in the context of the unit.

Final Grading Period – Formula: Define the derivation formula based on which the student unit attempt outcome marks will be calculated:

- **Weighted Average:** Indicates that the weighted average of all assessment items in the group is used for the student unit attempt mark or grade
- **Best N:** Indicates that the average mark or grade is calculated using the weighted average of the best marks (the number of marks that are averaged is set in the **Final Grading Period -- Number** field)

- **At least N:** Indicates that the average mark or grade is calculated using the weighted average of the best marks (the number of marks that are averaged is set in the **Final Grading Period -- Number** field) unless the student chooses to complete the maximum number of assessment items. In that case, all of the assessment items are averaged.
- **Null:** Indicates that the group's assessment items do not count towards the Final Grading Period's student unit attempt mark or grade

Final Grading Period -- Number: If the formula is **Best N** or **At least N**, then you must define the corresponding number of assessment items that are used to derive student unit attempt outcome marks.

Final Grading Period – Weighting: Define the weight of the assessment item group relative to other assessment item groups for final grading period.

Midterm Grading Period --Formula: Define the derivation formula based on which the student unit attempt outcome marks are calculated by selecting **Weighted Average**, **Best N**, **At least N**, or **Null**.

Midterm Grading Period -- Number: If the formula is **Best N** or **At least N**, then you must define the corresponding number of assessment item to be used to derive student unit attempt outcome marks.

Midterm Grading Period – Weighting: Define the weight of the assessment item group relative to other assessment item groups for midterm grading period.

Final Grading Period --Mandatory Type: Define whether a certain assessment item is:

- **Optional:** Indicates that the assessment item is not required
- **Mandatory:** Indicates that the assessment item is required
- **Mandatory pass:** Indicates that the assessment item is required and has to be passed

Final Grading Period – Weighting: Define the weight of each assessment item relative to other assessment items of the Final Grading Period Assessment Item Group.

Midterm Grading Period --Mandatory Type: Define whether a certain assessment item is **Optional**, **Mandatory**, **Mandatory pass**, or **Null**.

Midterm Grading Period – Weighting: Define the weight of each assessment item relative to other assessment items of the Midterm Grading Period Assessment Item Group.

Assessment item weighting: At least one assessment item must have a weighting of more than zero if the corresponding Assessment Item Group's Grading Period has a weighting of more than zero.

Unit Assessment Items Region

Include Deleted Items: If selected, then deleted unit assessment items are included while retrieving records.

Default: If this check box selected, then assessment item is allocated to all students enrolled in the unit. If not selected, indicates that the assessment item is optional.

Examinable: If selected, then assessment item is an examinable assessment type.

Scheduled: If selected, then an examinable assessment item is to be scheduled in the examination timetable.

Reference: Enter the reference to a unique value within each unit offering option assessment type. You must enter a reference for examinable items and assignments.

Due Date: If the assessment item is an assignment to be tracked through the Tracking subsystem, a due date must be entered. When tracking items for assignments are automatically created in the Initiate Tracking Items for Assignments report, Oracle Student System uses the due date to derive the action date for the Received from Student tracking step.

Release Date: Release date should be greater than or equal to due date

Action Date: Oracle Student System uses the action date to determine if any changes to a unit assessment item need to be applied to students enrolled in the unit through the Apply Unit Assessment Item Modifications to Student Units concurrent process.

Examination Calendar Type: Enter the unit assessment examination calendar type. If nothing is specified, Oracle Student System assumes that the assessment item is related to all the teaching period's parent examination calendars.

19.5.8 Setting Up Unit Section Assessments IGSPS090

Define unit section assessments and provide information (date, start and end times, location) about a final examination for a unit section.

Prerequisites

Unit section details are set up.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Assessments > Unit Section Assessments

Additional Notes and Business Rules

Meet with Exams: This button is enabled only if the unit section is within a meet with exam group. You cannot modify unit section assessment details if meet with exams exists for a unit section.

19.5.9 Setting Up Unit Section Assessment Items IGSPS092

Create assessment items specifically for unit sections. Unit section assessment items are inherited from the unit level and can be modified for the specific unit section.

You can create assessment item groups to make groups of assessment items that are attached to a unit section. You can set the default formula, number, and weighting for these user-defined groups of assessment items. This setup can be overridden for students in the Student Unit Assessment Item window.

You can also define unit section assessment item attributes that lead to automatic derivation of student unit attempt outcome from student unit assessment item outcomes.

Prerequisites

Unit section details are set up.

Navigation

Program Structure and Planning > Unit Section > Unit Section Details > Assessments > Unit Section Assessments > Assessments Items > Unit Section Assessment Items

Additional Notes and Business Rules

Unit Assessment Items: Fields in the Unit Section Assessment Items act the same way as fields on the Unit Assessment Items window. See Setting Up Unit Assessment Items IGSA011.

Assessment item weighting: At least one assessment item has to have a weighting of more than zero if the corresponding assessment item group's grading period has a weighting of more than zero.

Copy Unit Assessment Items: This button copies all assessment items and their respective group details as defined on the Unit Assessment Item window. This button is disabled if there are any **Active** assessment items defined for unit sections.

Copying from units to unit sections: When copying any unit assessment item to unit section assessment items, Oracle Student System checks if there are any students enrolled in the unit section. If so, the enrolled students must have already inherited the unit assessment items.

CAUTION: You must run the Apply Unit Assessment Item Modification to Student concurrent process to change the currently enrolled students' assessment items to unit section level assessment items.

19.5.10 Setting Up Student Unit Assessment Items IGSAS016

You can define mark derivation attributes, for Midterm and/or Final Grading Period for any assessment items associated with a unit or unit section by customizing the inherited mark/grade derivation attributes for any student unit attempt.

You can manually override the automatically derived unit attempt outcomes. You can also restrict faculty from finalizing the student unit attempt outcome and only allow administrators to perform the final step of the grade finalization.

Manually assign non-default assessment items to student unit attempts. Default assessment items are automatically assigned to student units by the Automatically Maintain Student Unit Attempt Assessment Items and Apply Unit Assessment Item Modification to Students concurrent processes.

You can also enter marks and grades for assignments and other assessment items and enter due date extensions for assignments and other assessment items.

You can view the following:

- Details of assessment items assigned to student unit attempts
- Assessment items assigned using a unit assessment pattern.
- Unit assessment item attributes that will lead to automatic derivation of Student Unit attempt outcome from student unit assessment item outcomes.

These new attributes can be manually overridden for a student unit attempt.

Prerequisites

Student unit attempts exist.

Navigation

Academic Records > Assessment > Student Unit Assessment Items

Additional Notes

See Setting Up Unit Assessment Items IGSAS011 for more information.

Weighting: At least one assessment item must have a weighting of more than zero if the corresponding assessment item group's grading period has a weighting of more than zero.

Final Grading Period Type: Define a final grading period type of **Mandatory**, **Mandatory pass**, **Optional**, or **Null**.

- When you enter the Final Grading Period Weighting and Midterm Grading Period Weighting, ensure that the number of assessment items defined satisfy the Assessment Item Group's Final Grading Period formula number.
- For example, if Assessment Item Group has a Final Grading Period -- Formula of Best N, and Number 3, you must define at least three or more assessment items.
- The **Penalty Applied** check box indicates that marks or grades have a penalty applied to them.
- The **Waived** check box indicates that an assessment item is waived. You cannot enter marks/grades for a waived assessment item.

Assessment item amount: There must be enough default assessment items to satisfy the formula numbers for Assessment Item Group's Final Grading Period and Assessment Item Group's Midterm Grading Period.

19.5.11 Automatically Maintain Student Unit Attempt Assessment Items

This concurrent process assigns assessment items defined for unit sections or units to students enrolled in the unit section. The concurrent process first checks for existing active assessment items for unit sections to assign to the students. If they do not exist, the concurrent process checks for active assessment items for units. It then assigns the default active assessment items of the unit to the enrolled students. Assessment items must be defined and student unit attempts must exist before you can run this concurrent process.

RECOMMENDATION: Set up this concurrent process to run daily until the end of the enrollment period for each term.

Runtime Comment: Enter the comment that appears on header page of report.

Report Level: Select the appropriate level of report to be displayed: Errors, Errors and Warnings, or Errors, Warnings, and Information.

Select Either Previous Log Date: If selected, previous exception report is duplicated without further processing and all other parameters are ignored.

Or Combination of the Following (Academic Calendar: Enter the twelve-month period representing academic activity cycle.

Teaching Calendar: Select the teaching calendar.

Program Code: Select the program code.

Unit Code: Select the unit code.

Student Number): Select the student number.

Location Code: Select the location code.

Unit Class: Select the unit class.

19.5.12 Apply Unit Assessment Item Modification to Students

Run the Apply Unit Assessment Item Modification to Students concurrent process if you have made updates to assessment items and want these updates to be attached to students.

This concurrent process performs the following tasks:

- Updates the default unit assessment items associated with a student when a new default assessment item is defined at the unit or unit section level
- Logically deletes any deleted unit section or unit assessment item from students enrolled in the unit section
- Logically deletes the unit level active assessment items before assigning active assessment items defined at the unit section level
- Maintains for each student enrolled in the unit section the changes to the assessment item group of the default assessment items

Assessment items must be defined and student unit attempts must exist before you run this concurrent process.

RECOMMENDATION: Set up this concurrent process to run daily until the end of the enrollment period for each term.

Runtime Comment: Enter the comment that appears on header page of report.

Report Level: Select the appropriate level of report to be displayed: Errors, Errors, and Warnings, or Errors, Warnings, and Information.

Select Either Previous Log Date: If selected, previous exception report is duplicated without further processing and all other parameters are ignored.

Or Combination of the Following (Academic Calendar: Enter the twelve-month period representing academic activity cycle.

Teaching Calendar: Select the teaching calendar.

Unit Code: Select the unit code.

Version Number: Select the version number.

Assessment Type: Select the assessment type.

Assessment Pattern: Select the assessment pattern.

Assessment ID: Select the assessment ID system-generated number that uniquely identifies assessment ID.

19.6 Student Unit Attempt Outcomes

When a unit is assessed, an outcome is entered for the student unit attempt. Outcomes can be entered manually, uploaded electronically, or automatically inserted as a result of the discontinuation of a unit, a blank result, or nonassessable units or unit attempts as indicated in the Student Enrollments window.

Outcomes can be expressed in terms of a mark, such as 82%, or a grade, such as Distinction, or both, as determined by the settings for the Mark/Grade Entry Configuration window. The grade must exist in the grading schema used to record the student unit outcome.

19.6.1 Setting Up Assessment Calendar Configuration IGSAS008

Map a system assessment date alias to a user-defined date alias. Associate the user-defined date alias, created in the Calendar subsystem, with the assessment item variation cutoff date. The assessment item variation cutoff date must be specified if you want to reduce the risk of unauthorized late unit assessment charges.

CAUTION: Date aliases must not be closed and must have a system calendar category of **Teaching**.

The assessment item variation cutoff date alias must have instances created in each teaching period. The date alias establishes a cutoff date for the alteration of unit assessment items. The date acts as a warning if attempts are made to update a unit's assessment requirements in the Unit Assessment Items window. For example, you can determine that the assessment requirements for units should not normally be varied after the end of the second week of standard teaching periods.

For each unit section offered, a grade is entered for either midterm, final or none. For unit sections requiring grades, entry submission start and end dates are maintained. There can be multiple grading periods, based on a grouping of students, for a unit section. For example, for final grading there may be a period for seniors, followed by a period for all other students or there would be midterm grades required only for freshmen.

Grade entry rosters must be produced for both midterm and final grade entry. Before they can be produced, Oracle Student System must recognize what rosters must be produced with start and end dates. You can add the date alias in the Assessments Calendar Configuration window for this purpose. These dates can act as triggers for the marks or grades submission workflow.

Prerequisites

Date aliases are set up.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Assessment Calendar Configuration > Configure Assessment Calendar

Additional Notes and Business Rules

Assessment Item Variation Cutoff Date Alias: This date alias is the assessment item variation cutoff date

Midterm Marks/Grades Submission Start Date Alias: This date alias is the start date alias for midterm Marks/Grades

Midterm Marks/Grades Submission End Date Alias: This date alias is the end date alias for midterm Marks/Grades

Early Final Marks/Grades Submission Start Date Alias: This date alias is the start date alias for early final Marks/Grades submission

Early Final Marks/Grades Submission End Date Alias: This date alias is the end date alias for early final Marks/Grades submission

Final Marks/Grades Submission Start Date Alias: This date alias is the start date alias for final Marks/Grades submission

Final Marks/Grades Submission End Date Alias: This date alias is the end date alias for final Marks/Grades submission

19.6.2 Setting Up Mark/Grade Entry Configuration IGSAS005

Define the configuration entered in the Enter Grades and Oracle Web Applications Desktop Integrator entry self-service windows and upload process.

You can set up automatic derivation of student unit attempt outcome from student unit assessment item outcome, and restrict instructors from finalizing and releasing grades.

Online Keying

By specifying options for online keying, you can determine how results are entered in Enter Grades and Oracle Web Applications Desktop Integrator entry self-service windows and upload process.

Electronic Upload

By specifying options for electronic upload, you can determine how validation checks are performed in the Oracle Web Applications Desktop Integrator upload process for Unit Attempt Outcomes window and Assessment Items window.

Options selected in these fields determine how validations perform in the outcome upload file and the upload student unit attempt outcomes process.

The following are available file validations:

- **Abort File:** Enables validation of remaining records to continue if any individual record fails validation. Records that fail validation are entered with the reason in an exception report and the file is not loaded into Oracle Student System.
- **Do Not Load:** Causes the file validation process to ignore any individual record that fail validation and enter them with the reason in an exception report. Records that fail validation are not loaded into Student System. However, all other records are loaded into the validated batch table, but not always uploaded into the database; for example, units discontinued after file validation.
- **Warning:** Appears as a warning on the exception, but the record is loaded. Only the Mark/Grade Invalid validation includes this option.

Grading Period Cohorts

Set up grading period cohorts.

Prerequisites

Person ID group definition is set up.

Class standing is set up.

Progression outcome types are set up.

Basic program details must be set up and all programs in **Active** status.

Basic unit set details must be set up and all units in **Active** status.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Mark/Grade Entry Configuration

Additional Notes and Business Rules

Electronic upload: In the Electronic Upload procedure, records are validated for a mark if the **Mark Entry Mandatory** check box is selected in the Online Keying Configuration region. Records with a grade that has a mark range and no mark entered are not uploaded and details appear in the exception report.

Collect Mark: If selected, then you can insert a mark for each record. This check box must be selected if the **Mark Entry Mandatory** check box is selected.

Mark Entry Mandatory: If selected, then a mark is required for each record where the grade has an equivalent mark range.

Derive Grade from Mark: If selected, then Oracle Student System automatically derives and inserts the grades for relevant mark range based on the grading schema. This check box can only be selected if **Collect Mark** check box is selected.

Invalid Mark/Grade Allowed: If selected, then a grade other than that normally corresponding to the mark can be entered if the grade is within the relevant grading schema.

Partial Unit Grade Submission Allowed: If selected, you can submit grades for a subset of students enrolled for a particular unit section.

Derive Unit Mark from Assessment Item Mark: If selected, then you can calculate the student unit attempt outcome marks based on student assessment item outcomes marks.

Allow Instructors to Finalize Grades: If selected, then instructors can finalize grades. If not selected, then Faculty responsibility users are restricted from finalizing and releasing grades.

Mark Entry Decimal Points: Enter the number of decimals for the mark to be entered and displayed. Values are 0,1,2, and 3.

Person Does Not Exist: Enter how to upload records with a person number that does not match the person number of any student records in Oracle Student System.

No Program Attempts: Enter how to upload records when student has no program attempt entered.

Unit Not Enrolled: Enter how to enter records for students.

Unit Discontinued: Enter how to enter records if student is withdrawn from unit.

Submitted Grade Exists: Enter how to enter records applied for which grades exist.

Saved Grade Exists: Enter if a saved grade exists.

Assessment Item Grade Exists: Enter if an assessment item grade exists.

Grade Invalid: Enter if a record contains a grade that is not within the grading schema for the student unit attempt.

Mark-Grade Combination Invalid: Enter how to enter records with grades within the grading schema that do not relate to the mark range for the mark entered.

19.6.3 Setting Up Incomplete Grade Conversion IGSAS034

Define the incomplete grade codes for the grading schema. You can define the incomplete grade conversion profile for different grading schema by organizational unit. This profile calculates the deadline for the resolution and the default grade upon expiration.

In the Enter/View Grades self-service page, self-service users can submit an incomplete grade and enter the details about how and when the incomplete grade is to be resolved. The Incomplete Grade Conversion System Profile window provides a default profile for this purpose.

Prerequisites

Grading schemas are set up.

Date aliases are set up.

Organizational units are set up.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Incomplete Grade Conversion System Profile > Incomplete Grade Conversion System Profile

Additional Notes and Business Rules

Organization Unit: If this field is null, then the profile is valid for the organization units for which a profile is specifically not defined.

Default Mark If not Completed: If selected, then default mark unit is not completed within the specified time.

Instructor may Update: If selected, then instructor can update grades.

19.6.4 Setting Up Anonymous Grading Method IGSAS038

You can substitute students' names on exams for an assignment with numbers to provide for anonymity in the marking or grading process.

Setting up anonymous grading allows students to submit an assessment item without any personally identifying information in order to remove bias from the assessment item grading process and from the unit grading process.

Anonymous grading must be set up in the Anonymous Grading Method window using one of the following types:

- Program based
- Section based
- Assessment based

Program Based

In program anonymous grading, students are assigned an anonymous number to be used for all anonymous assessment items throughout the duration of the student program attempt.

Section Based

In section anonymous grading, students are assigned an anonymous number by enrolled unit sections to be used for all assessment items and unit grading within that particular unit section.

Assessment Based

In assessment anonymous grading, a student is assigned an anonymous number by assessment item type to be used for all assessment items of that particular type across all enrolled unit sections. You can choose an assessment item number assignment for use in unit grading.

Anonymous Grading

After Oracle Student System is configured for anonymous grading and the **Enable Anonymous Grading** check boxes on the Basic Unit Details, Assessment Types, Unit Assessment Items, and Unit Sections windows are selected, the Maintain Anonymous ID concurrent process is run to generate an anonymous number for each student and stored so that future reporting such as exam rosters can use this number instead of the student's name or ID.

Anonymous IDs can be viewed on the View Anonymous IDs self-service page. Students are notified of their anonymous number through the Maintain Anonymous ID concurrent process.

Instructors assign grades anonymously in the Enter/Mark Grades window and with the Oracle Web Applications Desktop Integrator functionality the instructor will be able to upload anonymously grades exams.

Prerequisites

Assessment types are set up.

Calendar types are set up.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Items > Anonymous Grading Method > Anonymous Grading Method

Additional Notes and Business Rules

Unit Grading Source (Assessment Type): This field is enabled only if method is Assessment Type.

19.6.5 Anonymous Grading Check Box IGSPS047

Select the **Anonymous Grading** check box for units.

See Chapter 12, "Program Structure and Planning" for more information.

19.6.6 Anonymous Grading Check Box iGSPS058

Select the **Anonymous Grading** check box for unit sections.

See Chapter 12, "Program Structure and Planning" for more information.

19.7 Special Consideration for Students

If circumstances beyond a student's control affect the student's ability to complete an assessment item or the result, the student can apply for special assessment consideration. Oracle Student System records details of special consideration applications for unit assessment items and the outcomes of those applications.

19.7.1 Setting Up Special Consideration Categories IGSAS006

Special consideration categories are used in the Special Consideration Application Details window. They describe the grounds on which a student is applying for special consideration and are reviewed by academic officials when considering the application outcome.

Special consideration application details can be viewed in the applications for Special Consideration report.

Navigation

Academic Record > Assessment > Setup > Grading and Assessment Items > Special Consideration Category > Special Consideration Categories

Additional Notes and Business Rules

Deletion: After a special category is entered, it cannot be deleted and only minor modifications can be carried out.

19.7.2 Setting Up Special Consideration Outcomes IGSAS007

User-defined special consideration outcomes are the results sought by the applicant that you grant. These outcomes are used in the Special Consideration Application Details window. Application details are included in the Applications for Special Consideration report.

A sought outcome is the preferred outcome of the applicant and is recorded by the person processing the application prior to a decision being made.

Navigation

Academic Records > Assessment > Setup > Grading and Assessment Item > Special Consideration Outcomes > Special Consideration Outcomes

19.8 Examination Timetable

Examination Timetable functionality manages all examination functions (in conjunction with an integrated, external timetable generator), including the organization of:

- Timetables
- Examination materials
- Examination supervision
- Exam locations & venues

19.8.1 Setting Up Examination Supervisor Types IGSAS002

Enter user-defined examination supervisor types to categorize supervisors. These types are used in the Maintain Examination Supervisors window. Examination supervisor types such as chief and assistant provide an indication of the level of responsibility that supervisors can be expected to assume when supervising examinations.

While creating a supervisor type for an existing person:

- Do not enter a query
- Allocate supervisors only to locations of type Exam_loc
- Do not delete supervisors if they are assigned to examination sessions

Navigation

Academic Record > Assessment > Setup > Examination Timetable > Examination Supervisor Types

Additional Notes and Business Rules

In Charge: If selected, then a supervisor type is assigned to be in charge.

19.8.2 Setting Up Venues

See System Wide Services: Organizational Structure for information about setting up venues.

19.8.3 Setting Up Venue Session Availability IGSAS019

Enter availability of examination venues for sessions within a specified examination period. You can also deselect unavailable venues.

Prerequisites

Calendar types are set up.

Dale aliases are set up.

Navigation

Setups > Organizational Structure > Organizational Structure Setup > Globe > Locations > your location > your venue locations > Venue > Venue Session Availability

Additional Notes and Business Rules

Default Sessions: The **Default Sessions** button allocates a particular venue to all sessions within an examination period. This button is not accessible under the following conditions:

- If the examination period is not specified
- If there are no examination sessions for the examination period
- If the venue code is closed
- If the sessions are already attached

Creating new venues: For a new venue, right click your mouse for a menu and select **New**.

19.8.4 Setting Up Examination Supervisor Details IGSAS020

Create examination supervisors and assign them to examination locations. Supervisors with associated examination locations are further defined in the Supervisors to Venue window.

Examination supervisor types are maintained in the Examination Supervisor Types window. When creating a new supervisor, messages appear if the person is not a staff member or an active student.

Prerequisites

Person details are set up.

Examination supervisor types are set up.

Organizational units are set up.

Locations are set up.

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Examination Supervisor Details > Examination Supervisor Details

Additional Notes and Business Rules

Supervisor Type: Enter the position the supervisor holds in the examination session.

Organizational Unit: Enter the organizational unit to which the supervisor is responsible.

Sessions At Institution: This field indicates the number of sessions a supervisor attended prior to the current date.

Sessions at other Institutions: This field indicates the number of sessions supervised at other institutions.

19.8.5 Setting Up Examination Sessions IGSAS021

Enter examination session details for an examination period. Date alias instances representing each day of the examination period must be created within the examination period in the Date Alias Instances window, or the Date Alias Instances Calendar window before examination sessions are created within an examination period or calendar.

The session number is a secondary identifier for an examination session. Session numbers must be sequential and unique within the examination period. If an examination session is added at a later date, the session numbers must be renumbered to maintain the sequence.

After a record is saved, the start time and end time cannot be modified.

Prerequisites

Calendar types are set up.

Date aliases are set up.

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Examination Sessions

Additional Notes and Business Rules

Deletion: After an examination session is used in Oracle Student System, it cannot be deleted.

19.8.6 Setting Up Supervisors to Venue IGSAS022

Allocate supervisors to venues within examination sessions. The allocation of supervisors can be completed only after the final examination timetable has been produced and loaded into Oracle Student System from the timetabling application.

Supervisors are allocated to a particular session at a particular venue or to one or more examinations during a session at a venue. If a person number is inserted or a supervisor from the list of values selected, the supervisor's default supervisor type is inherited from the typical supervisor type but can be overridden for the session venue.

A supervisor can be automatically allocated to either all sessions at a venue within an examination period or all examination instances at a venue within an examination period.

The number of supervisors assigned to the examination session venue is validated by the supervisor limit in the Venues window. Messages are displayed if:

- The supervisor is assigned to a session and the venue is not within the supervisor's recorded examination location.
- The supervisor is allocated to another location on the same day.
- The supervisor is already allocated to supervise at a different venue within the session.
- The person does not have supervisor type **In Charge**.
- An in charge supervisor is already nominated for the venue session.
- The person is an active student.

- The person is not a staff member.
- The supervisor limit for the venue was exceeded.

An error validation is displayed if a supervisor is assigned a closed examination supervisor type.

Prerequisites

Person details are set up.

Examination supervisor types are set up.

Calendar types are set up.

Navigation

Academic Records > Assessment > Setup > Examination Timetable > Supervisors to Venue

Additional Notes and Business Rules

In charge supervisor: More than one in charge supervisor can be allocated to a venue or examination, in cases in which this role is shared between supervisors.

In Charge: The **In Charge** check box indicates if the supervisor is in charge. This information is defaulted according to the supervisor type.

Time fields: The **Override Start Time** and **Override End Time** fields are used to indicate the supervisor's attendance time at the examination session venue. The supervisor start and end times are inherited from the session start and end times unless override start and end times are entered. Override start and end times can be used to limit supervisors to attendance for only part of a session if standard start and end times do not apply.

Default Supervisor: Click this button to open the Default Supervisor window to enter a default supervisor for an examination session.

Default Off Campus Supervisor: Click this button to open the Default Off Campus Supervisor window to enter a default off campus supervisor for an examination session.

Examination Instance: If selected, then supervisor is allocated to all examination instances for all sessions at the venue. If the supervisor should not be allocated to all examination instances, delete those that are not applicable after running the Default Supervisor concurrent process.

Examination Venue: If selected, then supervisor is allocated to all examination sessions at the venue. If the supervisor should not be allocated to all examination instances, delete those that are not applicable after running the Default Supervisor concurrent process.

Ignore Warnings: If selected, suppresses any warning messages and ignores failed validations. For example, if the specified venue is not associated with the supervisor's nominated examination locations, the process ignores the warning validation and allocates the supervisor to the venue. A general warning message is displayed to indicate if any warning validations were encountered during the process. These must be resolved after running the Default Supervisor concurrent process.

OK: Click this button to run the Default Supervisor concurrent process

19.9 Setting Up Student Unit Attempt Outcomes IGSAS030

Make changes to existing marks and grades for a unit attempt for an individual student. You can also derive student attempt marks from student assessment item marks and capture other new student attempt outcome details.

For assessment items that you want to assign to one student only, you must create an assessment item at the unit section level and leave the Default check box deselected so the assessment item will not be inherited by all students. Run the Automatically Maintain Student Unit Attempt Assessment Item concurrent process and select the student as a parameter. You can navigate to the Student Unit Attempt Outcomes window to change the weight for the assessment item.

Prerequisites

Unit attempt has a status of **Enrolled**, **Discontinued**, or **Completed**.

The assessment item and the default unit section grading schema have a valid mark range.

Navigation

Academic Records > Assessment > Student Unit Attempt Outcomes

Additional Notes and Business Rules

Previous setup: The enabled check boxes on Mark/Grade Entry Configuration window affect the Student Unit Assessment Item Outcome window.

Manually Overridden: Select this check box to override the automatically calculated marks.

Derive Mark: Click this button to derive the mark for the student unit attempt outcome based on the student assessment item outcomes.

- **Derive Mark** button is enabled only if the **Derive Unit Grades from Assessment item Grades** check box is selected in the Mark/Grade Entry Configuration window.
- You can use **Student Unit Assessment Items** to view and/or update student unit assessment item outcomes.
- Student unit attempt marks are derived from assessment item marks only if the unit section is not marked as submitted and the **Manually Overridden** check box is deselected.

Mark Capped: This check box indicates that the student unit attempt outcome is limited to a certain maximum mark. When a student attempts again to pass a unit, he or she can only earn the limited maximum mark. This functionality is specific to UK and Australia.

Finalized: You can finalize the outcome by selecting this check box.

Show on Academic History: Define whether the changed grade is displayed on the Academic History self-service page.

Viewing student lists: Faculty or administrators can view the student list in self-service by the following categories:

- Enrolled
- Waitlisted
- Discontinued
- Dropped
- Completed the program

Auditors: The self-service page also displays a list of students who enroll in a program as auditors rather than to earn credits.

Oracle Web Applications Desktop Integrator: Oracle Web Applications Desktop Integrator allows the instructor to download information into an Excel spreadsheet. The instructor then enters grades/marks for the students and uploads the spreadsheet back into Oracle Student System.

Records: Degree Audit

20.1 Degree Audit

Oracle Student System provides a degree audit interface to enable you to connect to external systems and evaluate student academic achievements against degree requirements. In addition, external systems can also provide GPA calculation, evaluation of transfer units, and degree completion details.

20.2 Degree Audit Profile Options

Set up the following profile options:

- **IGS: Degree Audit Student List:** Set to enable individuals the ability to view lists of students during a batch request process
- **IGS: Degree Audit Workflow Administrator:** Set to identify degree audit's workflow administrator
- **IGS: Degree Audit / Transfer Evaluation Options:** Set to identify external software enabled at institution
- **IGS: XML Degree Audit W3C URI:** Set to identify WC3 XML Schema Standards
- **IGS: XML Degree Audit name space for Outbound XML:** Set to identify XML name space for Degree Audit Outbound XML
- **IGS: XML Degree Audit schema location for Degree Audit Outbound XML:** Set to identify schema location for Degree Audit Outbound XML

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see *Oracle Applications User's Guide*

20.3 Degree Audit Lookups

Set degree audit lookups.

Navigation

Setups > Lookups

Query the lookup type.

Additional Notes and Business Rules

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

- IGS_DA_COM_OVRIDES
- IGS_DA_DPMASKS
- IGS_DA_LINE_TYPE
- IGS_DA_PRNT_RQMNTS
- IGS_DA_PROD_RPTS
- IGS_DA_REF_ARTICS
- IGS_DA_RET_FORMAT
- IGS_DA_RPT_SIZES
- IGS_DA_SPCL_PRGMS
- IGS_DA_SPCL_PRGM_CATS
- IGS_DA_SRVR_NAMES

20.4 Configuring Degree Audit Interface IGSDA004

You can configure the degree audit system to your own requirements and define functionality available in self-service. This configuration information defines the default behavior of the data that will be sent to the external software. Default information can include the default institution ID type, address type, alternate ID type, the major, minor, and track unit set categories for what-if programs, the degree audit software to be used, the title of the degree audit software, and the link to it.

Prerequisites

The profile option IGS:Degree Audit/Transfer Evaluation Options is set to **Degree Audit Only, Combined Audit and Transfer Evaluation**, or **Transfer Evaluation Only**.

Navigation

Academic Records > Degree Audit/Transfer Evaluation > Degree Audit Interface Configuration

Additional Notes and Business Rules

Default student ID type: Enter the alternate person ID type corresponding to the one stored in the external system. If no alternate person ID is specified, Oracle Student System person number is used.

Send Combined Program and Major as Degree Program: If selected, then program and unit set details are sent to the external system. This enhances the performance of some of the external systems.

Default institution ID type: Enter the default institution ID type to be sent to the external system. If no alternate ID is specified, the Oracle Student System Institution ID is used.

What-if scenarios: Select the major, minor, and track unit set categories to be available for what-if scenarios. These selections define the categories that are displayed in the list of values for the Add Program Details self-service page.

Enforce Advisor/Advisee Relationship: If selected, then advisor can view only the students with whom the advisor/advisee relationship has been established. If deselected, the advisor can view the list of all students in self-service.

Display Degree Audit Software Content Container: If selected, then content container is displayed in self-service.

20.5 Configuring the Degree Audit Request Template IGSDA003

The request template enables you to customize the appearance of self-service pages and the functionality associated with each page. For example, the template can limit the requestor to select the report name, review the request, and confirm the request submission. The requestor can also add program details and select and preview the list of students.

Configure the degree audit request template to suit your requirements. You can request a degree audit, transfer evaluation, GPA calculation, or degree completion

requirements for a single student or a batch of students. You can specify the self-service responsibility and the access level for which the template is available, and the programs to compare the request against. The access level defines the privileges given to the responsibility. For example, a faculty can be given the access level of an advisor.

You can request a program comparison for programs existing in the external system, what-if programs, or declared programs. The what-ifs are programs existing in Oracle Student System. Declared programs in which students are enrolled. You can also select the options, or parameters, to be passed to the external system.

Use the Degree Audit Purge Request Report concurrent process to purge the generated reports.

Prerequisites

The profile option IGS:Degree Audit/Transfer Evaluation Options is set to **Degree Audit Only, Combined Audit and Transfer Evaluation, or Transfer Evaluation Only**.

Navigation

Academic Records > Degree Audit/Transfer Evaluation > Degree Audit Request Template Configuration

Additional Notes and Business Rules

Allow Purge of Completed Requests and Reports: To prevent the Degree Audit Purge Requests concurrent process from deleting requests that use this template, deselect this check box.

Enabled tabs: The Responsibility, Program Completion, and Request Option tabs are enabled for all request types. The Transfer Evaluation, GPA calculation, and Degree Completion tabs are enabled only for appropriate request types.

Self-service responsibility: Select the self-service responsibility and access level. The responsibilities selected here can access the request template in self-service. The access level can be that of student, advisor, or admin. You must specify at least one responsibility to save a request template.

Programs: Select the programs for which you want the degree completion requirements. Select the appropriate check box to include what-if, special, or declared programs in the Create Request self-service page. For Special and What-If program comparisons, you can enter a default value to be used when creating a

request in self-service. You must include at least one program for comparison to save a request template. If the request type is GPA Calculation or Degree Completion, you can and must include only the Declared program. For GPA calculation, you must enter at least one academic statistic with timeframe.

Modifiable: If selected, then the Add Program Details page in self-service in which you can modify any default program comparison and catalog values is displayed.

Include: If selected, then default values for program comparison and catalog must be entered.

Report options: These options enable you to specify parameters for a request. The list of values available vary based on the request type. The options selected here are displayed in the Select Report Options self-service page.

Configure Flag: If selected, then report options for the request type in Select Report Options self-service page are enabled. If selected, the option is used in XML request preparation. You can add an option to the request, but if it not configured, it is not used.

Forced: Select this radio button to enter a default value that cannot be changed when you place a request in self-service. If the **Default** radio button is selected, the default value is displayed in self-service but can be changed by the user.

Display Flag: If selected, then the report option in the Select Report Options self-service page is displayed.

GPA calculation: Select the academic statistic type for which GPA is to be calculated by external system. Specify the timeframe for which the statistic type is valid. You must select the request option of **GPA Calculation Term**.

Degree completion: Select the appropriate check boxes to complete programs and unit sets. You must select at least one check box.

20.6 Oracle XML Gateway

Oracle XML Gateway manages the creation of the outbound messages, the communication between the trading partners, and consumption of inbound messages, along with processing any associated error conditions.

Each XML request document is based on the degree audit request tables populated from the Oracle Student System User Interface. Oracle XML Gateway uses Oracle Student System mapped source views and a targeted XML document to perform the actual construction of each XML document. Oracle XML Gateway accepts

incoming XML documents and parses the document to store the external report details within Oracle Student System.

Oracle XML Gateway Message Designer is used to map Oracle Student System views of the degree audit data with the degree audit schemas. You can choose to set up Message Acknowledgement and Trading Partner Collaboration in Oracle XML Gateway.

See *Oracle XML Gateway User's Guide* for more information.

20.6.1 Oracle XML Gateway Set Up

Set up Oracle XML Gateway.

System Profile Options

See Appendix B, "Oracle Student System Profile Options" for information about setting the following system profile values:

- **ECX: Log File Path:** Set directory paths for XML messages, processing log files, and XSLT style sheets
- **ECX: XSLT File Path:** Set directory paths for XML messages, processing log files, and XSLT style sheets
- **ECX: System Administrator Email Address:** Set XML Gateway System Administrator e-mail address
- **ECX_OAG_LOICALID:** Identify sender's information system
- **ECX: Server Time Zone:** Set the time zone for the database server
- **IGS: XML Degree Audit name space for Outbound XML:** Set to identify XML name space for Degree Audit Outbound XML
- **IGS: XML Degree Audit W3C URI:** Set to identify WC3 XML Schema Standards
- **IGS: XML Degree Audit schema location for Degree Audit XML:** Set to identify schema location for Degree Audit Outbound XML You must assign the XML Gateway responsibility to an administrative user.

utl_file_dir parameters

Oracle XML Gateway uses the UTL_FILE package to read and write to the server file system. Your database administrator must set this up.

Hubs

Set up hubs and enter the HTTP and HTTPS address. This is the complete URL (including service/servlet) where Oracle Transport Agent will attempt to post to the XML document. SMTP protocol address is an e-mail address.

See *Oracle XML Gateway User's Guide* for more information.

Transactions

Define the transactions that will be used by the Oracle XML Gateway execution engine. The defined internal transactions will be associated with the external definitions.

Internal Transaction Definitions Additional Notes and Business Rules

Party type: Set the party type to Customer.

Transaction Type: Enter the transaction type of IGS_DA (the product short base on Oracle Application designation: Oracle Student Systems Degree Audit).

External Transaction Definitions Additional Notes and Business Rules

Enter the standard code (examples include PESC, OAG, and W3C). The standard code is the XML standard used. The queue defines the table in the database where the transactions are staged for processing.

See *Oracle XML Gateway User's Guide* for more information.

20.7 Oracle Transport Agent

The IGS Degree Audit workflow uses Oracle Transport Agent to process XML messages. Oracle Transport Agent receives an inbound XML message from the Trading Partner. It validates the message and passes it on the Oracle XML Gateway engine.

The Callback feature of Oracle Transport Agent reports message delivery status back to the workflow process that initiated the message creation. If the delivery fails, a workflow notification is sent to the system administrator defined in Oracle XML Gateway.

See Appendix C, "Workflow" for information on the IGS Degree Audit workflow.

Records: Graduation

21.1 Graduation Configuration

Complete the following setup to manage the records and processes required to identify students expected to graduate during particular ceremony rounds, including conferral of awards and attendance at graduation ceremonies:

- Set up graduation calendars and date aliases
- Set up award and honors level information
- Create each ceremony, identified by number, to be held in a ceremony round, together with venue, date, time, and other relevant details
- Create list of the awards to be presented for each ceremony
- Set up honorary awards for each ceremony
- Create awards for unit sets
- Set up all venues at which ceremonies are held

Windows associated with other subsystems provide information used in the Graduation windows. For example, award information is maintained in the Program Structure and Planning subsystem. Assessment windows and Organizational Structure windows record ceremony venues and link graduation locations to campuses where graduands study. Progression windows affect decisions about which students can graduate.

Graduation Setup

The following must be set up for Graduation functionality to be complete:

Graduand status: Graduand's academic eligibility to graduate and the current state of the graduand record.

Graduand approval status: Indicates if graduand is formally approved to graduate.

Graduation note type: Classifies notes and ceremonies according to purpose.

Credential type: Describes the format of the piece of paper you get given when you graduate. Examples include Diploma, Degree, and Doctorate.

Measurements: Full list of gown and hat sizes available to graduands

Awards: Represents awards conferred by your institution after completing the requirements of a program, and honorary awards, prizes, and medals

Program awards: Links between awards and programs and required for conferring awards and organizing graduation ceremonies

Graduand Records

After identification as a possible graduand, a graduand record is created for each ceremony round for which the student is eligible. The graduand record is the basis for any subsequent processing within the round. A second record, the graduand award ceremony record, is created when a graduand is assigned to a ceremony. This record must exist before an order-in-presentation number can be allocated to a graduand who wants to attend a ceremony. Both records are created for groups of students by running concurrent processes, but can also be created through the Graduand Details window for individual students and graduands. For honorary awards, graduand records must always be created manually through a window.

Graduand Status, Graduand Approval Status, and Graduand Type

The combination of the graduand status, approval status, and graduand type determines how far a graduand can progress through the graduation cycle. Graduand status determines a graduand's academic standing. Approval status signifies whether formal approval to graduate has been granted by a council or by the relevant academic organizational unit, at the discretion of an individual institution. Graduand type indicates a graduand's intentions about receiving an award.

A graduand cannot be entered as graduated unless the graduand has a system graduand status of **Eligible**, an approval status of **Approved**, and a graduand type of **Attending** or **Inabsentia**.

The following describes graduand status system values:

- **Potential:** Identified as possible graduand, but program not yet set as completed

- **Eligible:** Completion of relevant program is confirmed and Program Attempt Requirements Complete indicator set to Yes
- **Graduated:** Award has been conferred
- **Surrender:** Conferred award has been surrendered, typically in favor of a higher award

The following describes approval status system values:

- **Waiting:** Pending decision
- **Approved:** Approval granted
- **Rejected:** Not approved

The following describes graduand type system values:

- **Unknown:** Not yet notified by graduand
- **Attending:** Attending ceremony
- **Inabsentia:** Does not want to attend ceremony but is receiving award
- **Articulate:** Declines award in favor of pursuing studies for higher award
- **Deferred:** Wants to receive award in later, unspecified ceremony round
- **Declined:** Declines to accept the award for other reasons

21.1.1 Setting Up Graduand Statuses IGSGR001

Create user-defined graduand statuses to determine a graduand's academic standing. Map these statuses to system graduand statuses to indicate the current state of a graduand record and indicate if graduands can graduate in a ceremony in a particular ceremony round.

System graduand statuses are:

- Potential
- Eligible
- Graduated
- Surrender

The statuses change automatically as other details are changed or set by the Identify and Create Graduands and Assign Graduand Status concurrent processes. You can manually change the statuses in the Graduand Details window.

Navigation

Academic Records > Graduation > Setups > Graduand Status > Graduand Statuses

Additional Notes and Business Rules

Approval status: Indicates if formal approval to graduate has been granted by a council or by the relevant academic organizational unit at your discretion.

Graduand type: Indicates a graduand's intentions about receiving an award.

Deletion: After being assigned to a graduand record, a graduand status cannot be deleted.

21.1.2 Setting Up Graduand Approval Statuses IGSGR002

Create user-defined graduand approval statuses to indicate a potential graduand's progress toward graduation in a particular round. Map these statuses to system graduand approval statuses of **Waiting**, **Approved**, and **Rejected**.

Navigation

Academic Records > Graduation > Setups > Graduand Approval Status > Graduand Approval Statuses

Additional Notes and Business Rules

Statuses: Approval can be granted if the graduand status is **Eligible**. The graduand approval status must be **Approved** in order to graduate.

Deletion: After being assigned to a graduand record, a graduand approval status cannot be deleted.

21.1.3 Setting Up Credential Types IGSGR004

A credential type classifies a credential such as a diploma or any official printed document indicating a student receives an award.

You can set up a standard credential type for a program award and another non-standard credential type for joint awards if joint awards or double degrees format their diploma differently than a single degree.

Awards are associated with credential types in the Awards window mapped to them.

Navigation

Academic Records > Graduation > Setups > Credential Type > Credential Types

Additional Notes and Business Rules

Credential Type: After being assigned to an award, a credential type cannot be deleted.

21.1.4 Setting Up Awards IGSPS008

Set up graduation awards.

See Chapter 12, "Program Structure and Planning" for more information.

21.1.5 Setting Up Measurements IGSGR006

Enter the full range of hat, or mortarboard, and gown sizes available for graduands. All details you enter in this window appear in a list of values in the Graduand Ceremony Details window where hat and gown sizes for a graduand are entered.

Navigation

Academic Records > Graduation > Setups > Measurements > Measurements

21.1.6 Setting Up Graduation Note Types IGSGR003

Enter note types to classify notes about graduation ceremonies.

Navigation

Academic Records > Graduation > Setups > Graduation Note Type > Graduation Note Types

Additional Notes and Business Rules

Graduation Notes Type: Note types are used to classify note entered in the Graduation Ceremony window.

21.1.7 Setting Up Venues IGSAS017

Venues are grouped under graduation locations that link to the campuses where students study, including campuses in different suburbs, cities, regions, or countries. For example, campuses A, B, and C of your institution can link to a city graduation location, and campuses D and E can link to a regional graduation

location. One or more ceremony venues are associated with each graduation location, although each location can also have a single venue.

Note: A student program attempt must have a location which is related to the location of the graduation ceremony venue for the student to be automatically matched to the ceremony by the Allocate Graduands concurrent process.

Venues are created in System Wide - Organizational Structure subsystem.

Set up:

- Venues
- Venue Addresses
- Venue Availability

See System Wide Services: Organizational Structure for information about setting up venues.

21.2 Graduation Ceremonies

Set up and maintain graduation ceremonies. This includes specifying the dates and times determining the programs, awards and unit sets groups to be presented and the order in which they are to be presented. You can see and manage the graduands associated with a ceremony round, a particular ceremony, specific program awards and unit set groups (groups of majors for example).

21.2.1 Setting Up Graduation Ceremony IGSGR007

A ceremony round is a period of time during which a set of graduation ceremonies are conducted, the preparatory events, and processes leading up to the ceremony period itself. Each ceremony round is linked to one or more completion periods called ceremony round periods that identify potential graduands. Oracle Student System automatically identifies and creates graduand records if you run the Identify and Create Graduands concurrent process. These graduand records are compared to the nominated completion periods defined in Enrollment to ceremony round periods.

You can have two or three ceremony rounds during an academic year. Ceremony rounds can run concurrently, for example, when your institution conducts graduation ceremonies both at home and in another country. This situation can also be handled by differentiating between locations within a single ceremony round.

Ceremony rounds and their associated ceremonies are defined in the Graduation Ceremony window, one of three windows used to enter ceremony data. The Award Ceremony window, accessed from the Graduation Ceremony window, and the Unit Set Ceremony window, accessed from the Award Ceremony window, are also used to enter ceremony data.

The ceremony data is used primarily by the Manage Allocation of Graduands to Ceremonies concurrent process to allocate graduands with program awards to ceremonies, and the Set Graduand Order in Presentation concurrent process to set up presentation orders within each ceremony. Graduates can be allocated to ceremonies individually using the Graduand Ceremony Details window.

A graduation calendar instance broadly defines a ceremony round. Only those date alias instances already associated with the selected ceremony round are available for use in this window.

The total fields are automatically populated by information already entered in Oracle Student System. Combinations of graduate status, graduate approval status, and graduate type are used to determine the following types of totals:

- **Attending:** Graduands who are eligible (their program attempt is complete), may be approved or waiting to be approved and have said they will attend
- **Possible:** Graduands who are Potential (their program attempt is not yet complete), may be approved or waiting to be approved and have said they will attend
- **Total:** Sum of Attending and Possible

Prerequisites

Venues are set up.

Calendar types are set up.

Date aliases are set up.

Program details are set up.

Program must be active.

Awards are set up.

Navigation

Academic Records > Graduation > Graduation Ceremony > Graduation Ceremony

Additional Notes and Business Rules

Entering data: When the **Complete Start Date** and **Complete End Date** are populated, the **Conferral Start Date** and **Conferral End Date** and the **Ceremony Round Periods** cannot be entered. When the **Ceremony Round Periods** are populated the **Complete Start Date** and **Complete End Date** and the **Conferral Start Date** and **Conferral End Date** cannot be entered. When the **Conferral Start Date** and **Conferral End Date** are populated, the **Ceremony Round Periods** and the **Complete Start Date** and **Complete End Date** cannot be entered.

Complete and conferral dates: Complete dates use the requirements complete date from the student program attempt. Conferral dates use the conferral date from the Student Program Attempt Award. You can only use one of conferral, complete or round periods for a given ceremony round.

Complete Start Date: The Student Program Attempt Complete Start Date for the range of dates to be considered for this Ceremony Round. The Complete Start and End Date are used to identify Student Program Attempt records that have a Course Requirements Complete Date that falls within this range.

Complete End Date: The Student Program Attempt Complete Start Date for the range of dates to be considered for this Ceremony Round. The Complete Start and End Date are used to identify Student Program Attempt records that have a Course Requirements Complete Date that falls within this range.

Conferral Start Date: The Student Program Attempt Award Conferral Start Date for the range of dates to be considered for this Ceremony Round. The **Conferral Start** and **End Date** are used to identify Student Program Attempt Awards which have a conferral date which falls within this range.

Conferral End Date: The Student Program Attempt Award Conferral End Date for the range of dates to be considered for this Ceremony Round. The **Conferral Start** and **End Date** are used to identify Student Program Attempt Awards which have a conferral date which falls within this range.

Ceremony date: Information related to a ceremony cannot be updated after the ceremony date is passed.

Setup: You do not need to set up Venue Session Availability to set up Graduation Ceremonies.

Ceremony Number: After a ceremony is created, the ceremony number cannot be amended.

Ceremony Date Alias: This date alias is mapped to ceremony round, description, and alias value. The ceremony start date alias instance cannot be changed after graduands are allocated to the ceremony.

Closing Date Alias: This date alias indicates the cutoff point for the automatic allocation of graduands to the ceremony. Individual allocation of graduands to ceremonies can occur after the closing date using the Graduand Ceremony Details window.

21.2.2 Setting Up Award Ceremony IGSGR008

Enter awards to present at each ceremony within a ceremony round, after a ceremony round and its associated ceremonies are defined in the Graduation Ceremony window. An Order of Ceremony number assigned to each award indicates its order of presentation in the ceremony.

Most awards are directly related to programs or program versions, but honorary degrees must also be entered in this window. Awards are maintained in the Awards window.

In this window, graduands can be grouped by program version and award combination, or by award code.

Program awards can be grouped by unit set in the Unit Set Ceremony window, accessed from the Award Ceremony window, in the following instances:

- Awards are divided between ceremonies when the award involves many graduands who are divided between ceremonies according to their major or majors
- Graduands are presented in alphabetical order within their unit set, rather than within the award

Awards are assigned to program versions in the Program Awards window, accessed through the Basic Program Details window.

The groups established in the Award Ceremony window and the Unit Set Ceremony window are the basis for allocating graduands to ceremonies in the Manage Allocation of Graduands to Ceremonies concurrent process, and placing them in order of presentation within a ceremony in the Set Graduand Order in Presentation concurrent process.

If after running the Manage Allocation of Graduands to Ceremonies concurrent process the number of graduands in each ceremony is not balanced, one or more award records can be closed and added to other ceremonies. When the Manage Allocation of Graduands to Ceremonies concurrent process is run again, the

graduands are reallocated to another ceremony associated with their award, if one exists.

Prerequisites

Programs are set up.

Awards are set up.

Navigation

Academic Records > Graduation > Award Ceremony > Award Ceremony

Additional Notes and Business Rules

Field values: The values are determined by graduand status, graduand approval status, and graduand type. The values reflect the latest information about graduand attendance, not including guests, for the ceremony, and are calculated each time a record is queried.

- **Attending:** Number of graduands with Eligible, Approved, or Waiting status indicating that they are attending
- **Possible:** Number equal to Total field value minus Attending field value
- **Total:** Number of graduands with Potential, Eligible, Approved, Waiting status and indicating that they are attending or their intention is unknown

Unit Set Group: Entering unit set groups, allows graduands to be ordered by group within a program and award combination or within an award that is ordered across program versions.

Order in Ceremony: Enter a number indicating the order the awards are presented in the ceremony. The number must be unique, but can be duplicated for program awards if two different program versions have the same award code and graduands are presented in alphabetic order within the award, rather than the program version.

Program Code: In this field, **Active** and **Inactive** programs appear in the list of values and **Planned** programs do not. **Closed** program are displayed, but cannot be selected.

21.2.3 Setting Up Unit Set Ceremony IGSGR009

A program award entered in the Award Ceremony window is subdivided into groups of unit sets related to it. This is done to split an award across ceremonies and

to present graduates in alphabetical order within their unit set grouping rather than in alphabetical order within the award.

For example, if the award involves large numbers of graduates who are to be divided between ceremonies according to their major, the groups are placed in order of presentation within the award, with their component unit sets listed within the group.

Unit set groups are created solely for use in the Graduation windows and have no wider applicability.

Allocating Graduands

You can choose to subdivide only some awards into unit set groups within any particular ceremony. The decision to subdivide into unit sets or groups has certain implications.

- If a graduand has one or more primary unit set attempts for a program, then they must match exactly the unit sets entered as a group against the relevant program award. If not, the graduand is not allocated to the ceremony.
- If some graduates are eligible for a specific award after studying one unit set, and others are eligible after two, then unit set groups must be entered in both cases.
- Graduates who do not have a unit set attempt for the program are allocated to the ceremony at program award level.

Prerequisites

Unit sets are set up.

Navigation

Academic Records > Graduation > Award Ceremony > Award Ceremony

Additional Notes and Business Rules

Multiple unit sets: If a unit set group contains multiple unit sets, the Manage Allocation of Graduands to Ceremonies concurrent process considers graduates with attempts in all unit sets within the group.

Program awards: Administrative unit sets cannot be entered against program awards.

Allocating graduands: If the unit set groups are not added to another ceremony, the graduands are not allocated to a ceremony.

21.2.4 Setting Up Graduation Ceremony Notes IGSGR010

Enter notes for a ceremony.

Prerequisites

Graduation Note Types are set up.

Navigation

Academic Records > Graduation > Graduation Ceremony Notes > Graduation Ceremony Notes

Records: Order Documents

22.1 Order Documents Configuration

Students and administrators can order enrollment certificates and transcripts using self-service pages. Page display and available functionality for these self-service pages are set up in the Delivery Method Types window and the Document Request Processing Setup window. Users view past and current orders in the Order Summary self-service page.

Enrollment certificates and transcript requests are generated by running the Produce Enrollment Certificate concurrent process and Produce Transcript concurrent process.

Enrollment certificates can be print using any normal text printer. Transcripts require a post-script printer.

See *Oracle Student System User Guide* for information about running concurrent processes.

22.1.1 Terminology

The following table defines terminology specific to Records: Order Documents.

Table 22-1 Term Definitions for Setting Up Document Request Processing Setup

Term	Definition
Delivery Method Type	Manner in which the institution delivers the enrollment certificate or transcript to the self-service user. Examples include United States Postal Service and FedEx.
Lifetime Transcript Fee	Lifetime transcript service fee allows users o pay a one-time fee and request an unlimited number of transcripts.
EDI	Electronic Data Interchange. Not currently in use.

Table 22–1 (Cont.) Term Definitions for Setting Up Document Request Processing

Term	Definition
Document Fee	Fee charged for document processing and production.
Delivery Fee	Fee charged for document delivery.
Document Type	Type of document. Examples include Official Transcript, Unofficial Transcript, and Enrollment Certificate.
Fee Type	Fee type associated with either the document fee or delivery fee.
Transcript Service Plan	Transcript package defined by length of plan, number of copies, and associated fees. A Transcript Service Plan might offer unlimited copies for two years after graduation for \$20.00.
Document Purpose Code	User-defined code to identify a specific purpose for the document request. Examples include Graduate School Application and Job Requirement.

22.1.2 Setting Up Delivery Method Types IGSAS066

Use the Delivery Method Types window to set up the delivery method types available to self-service users. Map user-defined delivery methods to system delivery types.

Navigation

Academic Records > Order Documents > Setup Delivery Methods

Additional Notes and Business Rules

System Delivery Method Types: EDI (not in use), E-mail, Fax, Telephone and Manual. Use Manual for express mail or courier service where manual handling is required.

Fees: Set up fees for each user-defined delivery method type in the Document Request Processing Setup window.

22.1.3 Order Document Lookups

The IGS_AS_DOCUMENT_SUB_TYPE lookup values populate the Document Type list of values in the Document Request Processing Setup window.

The seeded values for the lookup include **CONTINUING_EDUCATION**, **ENCERT** (Enrollment Certificate), **LIFE_TIME_TRANS**, **OFFICIAL**, **OTHERS**, and **UNOFFICIAL**.

You can add values to this lookup if you offer different types of documents.

Navigation

Setups > Lookups

Additional Notes and Business Rules

See Appendix D, "Oracle Student System Lookups" for information about adding values to extensible lookups.

22.1.4 Setting Up Document Request Processing Setup IGSAS067

In the Document Request Processing Setup window, create the options displayed in the Order Documents self-service pages.

Prerequisites

Fee types are set up.

Navigation

Academic Records > Order Documents > Setup Processing Options

Additional Notes and Business Rules

Provide Transcripts Region:

Self-service Transcripts: Select the **Provide Transcripts** check box for self-service transcript requests.

Offer Transcript Service Plans: If selected, the Transcript Service Plan tab is enabled and you can customize transcript service plans.

Allow all Academic history to be combined in one document: If selected, self-service users can request a transcript that includes all academic history in one document.

Do not allow Transcript to be requested if Transcript Hold exists: If selected, Oracle Student System searches for holds set in the Student Finance subsystem and a message appears on the Order Summary page advising the user which documents

can be ordered. If not selected, self-service users can request documents regardless of student holds.

Allow Transcript request but delay delivery until hold is released: If selected, Oracle Student System searches for holds set in the Student Finance subsystem and a message appears on the Order Summary page advising the user that documents can be ordered but delivery will be delayed until the hold is released. If not selected, self-service users can request documents regardless of student holds.

Provide Enrollment Certifications Region:

Self-Service Enrollment Certificates: Select the **Provide Enrollment Certificates** check box to enable students to place enrollment certificate orders through self-service.

Options for Enrollment Certificates and Transcripts:

- **Enable Bill me Later option for current students:** If selected, current student self-service users can add document fees and delivery fees to their account. If not selected, the only payment method available to current or former student self-service users is credit card. Administrative self-service users always have the Bill me Later option to allow a cash or check payment to be recorded.
- **Provide Duplicate Documents:** If selected, multiple copies of the produced documents can be generated by an Administrative responsibility person without any additional cost to the student.

Student Finance

23.1 Student Finance Overview

You can manage student and sponsor account activity. This includes assessment of tuition and fees, and payments and deposits received from students and sponsors, as well as disbursements of financial aid from the Financial Aid subsystem.

The Student Finance subsystem operates as a true subledger to Oracle General Ledger for student related financial activity. It can also operate with third party software.

Set up the data framework for fee processing. After the data framework is established, little additional data entry is required. Daily work mainly consists of running and monitoring concurrent processes, and using a small number of windows to query and enter fee related adjustments to individual student records.

Create a data framework is created for each fee period within your institution's financial year. This framework can be rolled over from year to year and modifications can be made as required. Fee processing follows a cycle that is based on a fee period.

Terminology

The following describes Student Finance terminology:

Fee type: Name of a fee or charge. Examples include Tuition, LabFee, and GeneralService. One fee type can be included in many fee categories.

Fee category: User-defined set of fees payable by a student for a program attempt. A student is assigned a fee category through the Admissions or Enrollment subsystem when applying for admission to your institution or enrolling in your institution. You set up fee types and fee categories and assign fee types to the categories. The fee assessment process (consisting of Process Fee Assessment -

Landscape and Process Fee Assessments from To Do Entries concurrent processes) matches students and fees by matching fee categories.

Fee liability: Single fee type within a fee category.

Fee type calendar instance: A fee type attached to a calendar instance that contains the start and end date within a fee period.

Fee period: Periods of time set up with fees to be assessed for students enrolled in those periods. Fee periods are also referred to as **fee calendar instance** or **fee assessment period**. Subsystem data is set up within specific fee periods. For example, a fee period called **FEE-SEM1** runs from 01-JAN-2004 to 30-JUN-2004. Fee categories **International** and **Domestic** are set up for this period. Students who enroll between these two dates are responsible for the fees in their respective categories. All fee periods are connected to a financial calendar representing your institution's fiscal year. **Fee calendar instance** has a one to one relationship with the **load calendar instance** with **Fee** as the superior calendar and **Load** as the subordinate calendar.

Start and end date alias: Beginning and termination dates, linked to a fee period and to a fee type calendar instance, marking limits when fee assessment can be run. Start and end date aliases do not have to correspond to the functional or logical dates of the fee period. That way, the date aliases can be set before or after the logical fee period dates so that enrollment, fee assessment and other processes can be performed for pre-enrollment and early billings. If required, start date alias can occur before teaching begins. Start and end date aliases can be set for different operations.

Retro date alias: Absolute cutoff point after which fee assessment cannot be run for the fee period. Retro date aliases are optional. Retro date aliases can be any date, for example, year or more from the current date, depending on how long after the fee period you want to make fee adjustments.

23.2 Overview of Financial Accounting in Oracle Student System

All transactions, including charges, credits and applications that occur within student finance create accounting activity and journal entries. Student Finance recognizes accrual accounting and cash basis accounting.

There are two installation variables for Student Finance. You can implement Oracle Student System using accrual accounting or cash basis accounting. You can also choose to implement Oracle Financials. Depending on the variables you select, set up one of the following combinations:

- Accrual accounting method with Oracle General Ledger installed
- Accrual accounting method without Oracle General Ledger installed
- Cash basis accounting method with Oracle General Ledger installed
- Cash basis accounting method without Oracle General Ledger installed

When Oracle General Ledger is installed, Student Finance uses the standard Oracle accounting flexfield combinations to record accounting information. The standard general ledger account is composed of a user-defined number of segments. Each segment is composed of a user-defined number of alphanumeric characters which has been set up in Oracle General Ledger.

Oracle Student System builds an account by combining different segments of data. These combined segments are mapped to functionality within the Student Finance subsystem.

23.2.1 Charges

There are several types of charges in Student Finance:

Fee assessment: Fees (calculated and stored) applicable to individual students. If a student's enrollment changes, Oracle Student System reassesses fees owed.

External charges: Charges from external sources including other auxiliary operations such as parking permits or fines, and library fines. External charges are calculated outside the student system and imported onto the student account.

Ancillary charges: Charges of a student that originate outside the student finance office. These charges have to be included in billing and other student finance processes, such as housing or meal plans. Based on the attributes that are attached with a particular student, the student finance office uses the imported student attributes to assign a rate and calculate the ancillary charges.

Finance and late charges: Charges assessed and applied using various criteria including flat rate or periodic rates based on average daily balance or balance outstanding for a period defined in the concurrent process parameters.

Refund charges: Charges for persons with unapplied excess can be refunded. Charges are applied to the excess credits.

Sponsorship charges: Charges placed on the sponsor account for disbursements made on the student account per the sponsorship agreement.

Negative adjustments: Charges that partially reduce or reverse the balance of a student's account such as a change in enrollment that results in the student being

assessed a lower fee either for a single flat rate charge or a reduced fee across all charge lines in a charge per credit point or per unit scenario, or a rate reduction that results in a student being assessed a lower fee either for a single flat rate charge or a reduced fee across all charge lines in a charge per credit point or per unit scenario.

Charges for transcripts: Charges with system fee type of **Document** that originate from self-service transcript orders.

Aid adjustment charges through disbursements in Financial Aid and sponsorships: Negative adjustment to the amount of financial aid awarded to the student. Aid adjustments charges are created on the student account as a result of a decrease in a financial aid or sponsorship disbursement. After the adjustments to the financial aid or the sponsorship disbursement have taken place, the Awards - Disbursement - Transfer to Student Account concurrent process creates the charge on the student account.

23.2.2 Credits

All credits are created using the Credits API and these credits are listed in the Student's Account Summary.

Credits are created as follows:

Receipts: You can handle over-the-counter payments for students as well as enter and record receipts of all instruments such as cash, check, and credit card.

Sponsorships: Sponsors can pay for all or a portion of a student's tuition and fees, for specific terms. You can assign students to a sponsor and maintain details of the fee classes and percentage of fees that the sponsor pays.

Financial Aid subsystem: Financial aid is imported into Student Finance as a credit on the student's account.

Lockbox: Receipts that are received in Student Finance through the Lockbox Interface appear as a credit on the student account.

Self-service: Payments in self-service are entered as credits to the student account.

Credits API: Source of receipts from an external system such as a cashiering system.

23.2.3 Accounting Information

Accounting information is defined by a set of books in Oracle General Ledger, which contains a chart of accounts, a calendar, and currency. The chart of accounts stores all the accounting information in a set of numbers called the Oracle General

Ledger accounting flexfield. This flexfield is a structure composed of user-defined number of segments.

At minimum, three segments are required:

Fund: The fund segment is also called the balancing segment. This is the basic segment. All debits must equal credits within a single value of the balancing segment.

Cost Center: The cost center segment represents a department, a project, an organization, or any entity the user defines as a cost center. It is used to group accounts on the income statement. It is not often used for balance sheet accounts.

Natural Account: The natural account segment determines the nature of the Oracle General Ledger account in question. Some examples of the nature of the account include revenue, expense, asset, liability, or equity. All values in this segment are defined in ranges for the convenience of grouping accounts.

Build Accounts Process

The accounting flexfield code combinations are built by the build accounts process internal package. This package generates debit and credit account pairs for charge and credit transactions. For charge transactions, the build accounts package provides revenue account flexfield or code and Oracle Receivables account flexfield or code. For credit transactions, this package provides cash and unapplied account.

To arrive at a complete revenue account flexfield combination for a charge transaction, the build accounts package goes through a user-defined hierarchy assigned for fee types and collect various Oracle General Ledger accounting flexfield segment values from different entities associated with the account hierarchy. The typical entities include the following:

- Program
- Unit
- Unit section
- Organization unit
- Location
- Fee type

Natural Account Segment Derivation

The attributes required to be mapped to the revenue natural account segment (If Oracle General Ledger is set to **Yes**) or revenue account code (If Oracle General Ledger is set to **No**) are as follows:

- Location
- Attendance Type
- Attendance Mode
- Program. Version
- Unit. Version
- Org Unit Code
- Residency Status
- Unit Section

This mapping is completed when values are set up in the tab.

23.2.3.1 Oracle General Ledger Set to Yes in the System Options window

Account table definition provides the capability to define different values for the Natural Account Segment (only) based on the different combination of attributes.

If the account table is defined in the Fee Types Accounts window for fee types, then the build account package derives the natural account segment value for the accounting flexfield from the account table definition. It uses the existing account hierarchy functionality for the derivation of the account table.

You can optionally define the account table in the Fee Type Accounts window for system fee types **Tuition** and **Other**, in addition to the definition of the account hierarchy, hierarchy order, accounts (program, location, unit, etc.), attaching account hierarchy to the FTCL.

23.2.3.2 Oracle General Ledger Set to No in the System Options window

The build account package derives the revenue account code value from the account table definition. For the system fee type is other than **Tuition** and **Other**, then the Account Table Tab definition is not available. The build account package obtains the revenue account code from the **Revenue Account Code** field on the Fee Type Accounts window for fee types.

You can define the account table in the Fee Type Accounts window for fee types for system fee types **Tuition** and **Other**.

23.3 Implementing Oracle Financials

If you choose to use Oracle Financials, you must implement Oracle Receivables, Oracle Payables, and Oracle General Ledger. Oracle General Ledger can be used to manage Oracle Student System financial transactions. To do this, Oracle General Ledger must be implemented before setting up the Student Finance subsystem. See *Oracle General Ledger User Guide* for information about setting up Oracle General Ledger.

Each transaction has specific values for various attributes such as fee type, unit section, organization, and program. During the creation of these transactions, values of these various attributes are passed to the Build Accounts API from the Charges API or Credits API. The Build Accounts API searches each attribute and associated Oracle General Ledger segment values of the Oracle General Ledger code combination in the order of the user-defined hierarchy.

For each value of any given attribute, you can define one or more associated segments of the accounting flexfield. For example, given the single attribute of fee type, you can define only one segment, **Tuition**, for the fee type, but you can define more than one for the room and board fee type.

Posting to Oracle General Ledger

The accounting information for all Student Finance subsystem transactions are transferred directly to Oracle General Ledger whether or not Oracle General Ledger is set to **Yes** or **No**.

Use the following concurrent processes to transfer transactions to the Oracle General Ledger Interface table:

- Oracle General Ledger Interface Process concurrent process
- Posting Interface Process concurrent process

The Oracle General Ledger Interface Process concurrent process selects the transactions from the Charges Line table, Credit Activities table, and Applications table and posts them to Oracle General Ledger.

For more information, see *Oracle Student System User Guide*.

Prerequisites

The following setup in Oracle General Ledger must be completed:

- Journal Source set to **Student System**
- Journal Category set to **Charges, Credits, Aid, Refund Offset, Deposits**

23.3.1 Third Party Financials Solution

If you choose to use a third party financials solution, you must define:

- Currency codes
- Fee calculation method
- Default receivables
- Default revenue
- Default cash and unapplied segments
- Fee posting accounts in the Fee Posting Accounts window

23.4 Setting Up Oracle iPayment

Oracle iPayment provides an integrated electronic payment solution for both electronic commerce applications and client-server applications.

Oracle iPayment supports two electronic payment methods: credit card and bank account transfers. Oracle Student System only supports credit card processing.

Use Oracle iPayment to provide payment processing for credit card payment through self-service.

23.4.1 Setting Up Lookups

Enter user-defined codes for IGS_CC_EXP_Year in the Lookups window to set up credit card expiration years. Enter codes for IGS_FI_SOURCE_TRANSACTION_REF and IGS_FI_WAIVER_REASON.

Prerequisites

Oracle iPayment setup is complete.

Navigation

Setups > Lookups

Additional Notes and Business Rules

Lookup code: You will need to add additional years after 2010, the latest seeded year. Enter a code, meaning, and description that is easy for users to understand.

Enable: Select this check box if you want the lookup to be operational within the effective date range.

23.4.2 Setting Up Payment Administrator Responsibility

Assign Payment Administrator responsibility to users who will be responsible for Oracle iPayment functionality.

Prerequisites

Responsibilities are set up.

Responsibility

E-Business Suite System Administrator

Navigation

Log in to Oracle E-Business Suite using the System Administrator's user id and password.

Steps

1. Assign Payment Administrator responsibility to users responsible for Oracle iPayment functionality.
2. Set up your user Default Responsibility as Payment Administrator

23.5 Student Finance Profile Options

Set up the following Student Finance profile options:

- **IGS: Use Funds Authorization:** Set to enable your institution to use funds authorization
- **IGS: Remit To Address Usage:** Set remit to address to set up remit to addresses for the student or sponsor send in their payments
- **IGS: Include Waitlist:** Set to include waitlisted credit points in total. Student Finance fee assessment processes have a dependency on this profile.
- **IGS: Attendance Type and Attendance Mode:** Set attendance type and attendance mode
- **IGS: Mask Credit Card Number:** Set to mask credit card number in self-service
- **IGS: Merchant Reference:** Set payee ID to **OSS Merchant** to finish Oracle iPayment setup

- **IGS: Student Finance Pay Refund Voucher Alone:** Set to pay refund vouchers alone or separately in Oracle Payables
- **IGS: Supplier Name:** Set to derive supplier name for party type person for supplier creation in Oracle Payables
- **IGS: Supplier Number:** Set to derive supplier number to create supplier in Oracle Payables
- **IGS: Charge Tuition for Audited Student Unit Attempt:** Set to charge regular tuition on the audited student unit attempts

Refer to Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see to the *Oracle Applications User's Guide*.

23.6 Student Finance Lookups

Set up student finance lookup codes.

Navigation

Setups > Lookups

Query the lookup type.

Additional Notes and Business Rules

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

- IGS_FI_SOURCE_TRANSACTION_REF
- IGS_FI_WAIVER_REASON

23.7 Student Finance Options

This section identifies the fundamental setup required to support the Student Finance subsystem.

23.7.1 Setting Up System Options - Header IGSFI037

A single record is created using the System Options window. That means that for each installation of the Oracle Student System, there can only be one Student Finance System Options setup.

All transactions, including charges, credits and applications that occur in the Student Finance subsystem create accounting activity that comply with Generally Accepted Accounting Principles (GAAP). There are several key system options that should be defined at the header level:

- Oracle General Ledger
- Manage Accounts
- Accounting Method
- Fee Calculation Method
- Name
- Currency
- Include Planned Credits

Oracle General Ledger

If you want to use Oracle General Ledger, select **Yes** in this field. All transactions created in the Student Finance subsystem are transferred to the Oracle General Ledger through the Oracle General Ledger Interface concurrent process. When Oracle General Ledger is installed, Student Finance uses the standard Oracle accounting flexfield code combinations to record accounting information.

Manage Accounts

This field refers to the account management systems that you can choose to manage financial transactions. You can choose between using student finance or an external receivables system to manage the debt position of the student, such as maintaining the student's balance, recording their payments, issuing statements or invoices, applying financial holds or late charges. This account management also applies to sponsors as well, for they also have debt positions or balances to maintain and payments to record.

Third Party Receivables

Student Finance is statement-based in the sense that all account management activity revolves around a student's account balance rather than a single invoice within that account.

You must choose account management processing of either **Student Finance** or **Other**. This selection and the selection of either Oracle or non-Oracle Financials for general ledger accounts creates a total of four possible modes of operation:

- Using Oracle General Ledger, in conjunction with using Student Finance for account management
- Using Oracle General Ledger, but using a separate third party receivables system for account management
- Using a non-Oracle general ledger system, in conjunction with using Student Finance for account management
- Using a non-Oracle general ledger system, and using a separate third party receivables system for account management

CAUTION: If the third party receivables model is implemented (by selecting Other), the following functionality is disabled because the transactional data is stored outside of Student Finance:

- Oracle Student System Student Account management (including application of all credits, Sponsorship Credits, waivers, and all operations used to maintain balances)
- Receipts (Receipting payments through Oracle Student System)
- Oracle Student System Billing Extract
- Student Finance self-service
- Refunds
- Financial Aid
- Financial Holds
- Finance and Late Charges

Since this mode of operation requires that all payments be processed in the third party receivables system, there are processes in other Oracle Student System modules that depend on payment processing in Student Finance that are affected. These include the following:

Admissions: The self-service application fee functionality is not available. Payments related to the Application process must be processed in the third party receivables system. Enrollment deposit payments must be made in the third party receivables system.

Records: Transcript fees or document fees cannot be paid in self-service. Ordering transcripts in self-service is possible, but payments must be processed in the third party receivables system.

Transfer to Commercial Receivables Interface: Charges and Credits related to sponsorships and charge adjustments in student finance must be transferred to an external third party receivables system for account management. Any balance or account management operations such as managing late fees and receiving payments must be performed in the third party receivables system.

See *Oracle Student System User Guide* for information about running third party receivables concurrent processes.

See Setting Up System Options - Header IGSFI037 for information about choosing third party receivables or Student Finance for account management.

See *Oracle Receivables User Guide* for information about setting up Oracle Receivables.

Accounting Method

You can implement in the accrual or cash method of accounting.

Fee Calculation Method

The setting of the profile option IGS:Career Model Enabled determines which values populate the list of values for the Fee Calculation Method field on the System Options window. If the profile IGS:Career Model Enabled is set to **Yes**, then the Fee Calculation Method list of values includes only **Assess by Career** and **Assess by Primary Career**. If the IGS: Career Model Enabled is set to **No**, then the fee calculation method **Assess by Program** is included in the list of values in the Student Finance System Options window.

You can select **Assess by Program**, **Assess by Career**, or **Assess by Primary Career**.

Institution Attendance Types: Institution attendance type is based on primary career load. You are required to manually designate one program as the key program by selecting the **Key Program** check box on the Student Program Attempt window, which determines the primary career in the career structure model.

Assess By Programs

You can assess fees by programs. In this option, fee calculation ignores key program and assesses fees for each program. The attendance type in the rate table is based on the attendance type for each program. The class standing in the rate table is based on the class standing of each program.

Charge Element Calculation: If the charge element calculation is based on unit based charge methods, for example, charged by unit or by credit point, then the units or credit points are totalled by each program before assessment and assessed against the rate of each program. If a student is enrolled in more than one program concurrently, fees with a system fee trigger category of **Institution** are calculated against both programs, though the amounts shown represent a single assessment. If assessment is unit based and the trigger is **Institution**, then you must sum the load for student unit attempts across all applicable programs where this fee is a liability.

Element Ranges: You must sum all loads for each student program attempt for regular fees. For fee with a system fee trigger category of **Institution**, you must sum all the applicable student unit attempts for each fee liability. Since institution fees are assessed only once, all the applicable student program attempts are considered only once. The student unit attempts within those applicable student program attempts are summed for total element ranges.

Charge Rate Determination: The following describes charge rate determination for assessment by program:

- **Program:** Student program attempt program value is used.
- **Attendance type:** Program attendance type value is used.
- **Attendance mode:** No change from present calculation
- **Organization unit code:** Organization unit code is used for the student program attempt if the charge method of the fee is **Flatrate**. If the charge method is unit based, organization unit code from the student unit attempt is used. If there is no value for the student unit attempt, then organization unit code from the unit section definition is used.
- **Class standing:** Class standing value for the student program attempt is used.
- **Location code:** Value from student program attempt is used if charge method is **Flatrate**. If unit based charge method, then Oracle Student System uses value from student unit attempt.

The following describes institution fees for charge rate determination for program:

- **Program:** None

- **Attendance type:** Oracle Student System uses institution attendance type, which sums the load and then divides by the key program annual load.
- **Attendance mode:** No change from present calculation. If there is more than one mode across units, then composite value is used.
- **Organization unit code:** None
- **Class standing:** None
- **Location code:** None

Assess By Career

You can assess fees by career. In this option, fee calculation ignores key program and assesses fees for each career, which is derived from the primary program. Multiple careers yield multiple assessments except for fee types with the trigger of **Institution**. The attendance type in the rate table is based on units in each career, or primary program. The class standing in the rate table is based on the class standing of each career, or primary program.

Charge Element Calculation: If the fee is a regular fee type with unit based charge method, then users must sum the load from all student unit attempt for the primary program for the career. For institution fee types with unit based charge method, then you must sum the load for all student unit attempts for the applicable primary programs. Only one institution fee is charged regardless of the number of primary programs.

Element Ranges: You must sum all loads for the student unit attempts for the primary program of each career for regular fees. For institution fees, you must sum all student unit attempts for all applicable primary programs.

Charge Rate Determination: The following describes charge rate determination for career:

- **Program:** Primary program for each career is used.
- **Attendance type:** Career attendance type is used. This is the sum of student unit attempts linked to each primary program divided by the primary program annual load and then compared to the program attendance type setup.
- **Attendance mode:** The value used is derived from the student unit attempt associated with each primary program.
- **Organization unit code:** Organization unit code set up at each primary program level if the charge method of the fee is **Flatrate** is used. If the charge method is unit based, then the organizational unit code from the student unit

attempt is used. If there is no value for the student unit attempt, then organization unit code from the unit section definition is used.

- **Class standing:** Career class standing is used.
- **Location code:** Value from each primary program is used if **Flatrate** is the charge method. The value from student unit attempt is used if unit based is the charge method.
- **Institution fees:** None

The following describes institution fees for charge rate determination for career:

- **Program:** Key program value is used.
- **Attendance type:** Sum of all units across applicable primary programs that have that fee liability is used. If a fee is not in the fee category, those units are not subject to assessment. Career attendance type and institution attendance type are used.
- **Attendance mode:** All units across applicable careers are assessed. If modes are different, then composite trigger is used.
- **Organization unit code:** None
- **Class standing:** Class standing of the key program is used.
- **Location code:** None

Assess By Primary Career

You can assess fees by primary career. In this option, fee calculation is based on the fee category for the primary career as determined by the **Key Program** check box on the Student Program Attempt window. The attendance type in the rate table is based on institution attendance type. The class standing in the rate table is based on the class standing of the primary career. If the charge element is unit or credit points, then all units or credit points for all programs are totaled prior to assessing against the rate for primary career.

Charge Element Calculation: If the fee is a regular fee type with unit based charge method, you must sum the load from all student unit attempt for the primary program for all of the careers. For institution fee types with unit based charge method, you must sum the load from all student unit attempt for the primary program for all of the careers.

Element Ranges: You must sum all loads for the student unit attempts for the primary program for regular fees. For institution fees, you must sum all student unit attempts for regular fees.

Charge Rate Determination: The following describes charge rate determination for primary career:

- **Program:** Key program is used.
- **Attendance type:** Sum of student unit attempts linked to all primary programs divided by the key primary program annual load and then compared to the program attendance type setup is used.
- **Attendance mode:** Mode attached to key program is used.
- **Organization unit code:** Organization unit code set up at the key program level is used if the charge method of the fee is **Flatrate**. If the charge method is unit based, then organizational unit code from the student unit attempt is used. If there is no value for the student unit attempt, organization unit code from the unit section definition is used.
- **Class standing:** Class standing of key program is used.
- **Location code:** Value from key program if **Flatrate** is the charge method is used. Value from student unit attempt if unit based charge method is used.

The following describes institution fees for charge rate determination for primary career:

- **Program:** Key program across all careers is used.
- **Attendance type:** Institution attendance type for key program is used.
- **Attendance mode:** Mode attached to key program is used.
- **Organization unit code:** None
- **Class standing:** Class standing attached to key program is used.
- **Location code:** None

Name

If you use Oracle General Ledger, then you must select a Set of Books name. When configuring the student finance system options for the single Oracle Student System installation, you must select one Set of Books within the Oracle Financials.

When you are setting up system options, log in under a specific Oracle responsibility (for example, Oracle Student System Super User). This responsibility has an operating unit (Org ID) associated with it. This operating unit is stored along with the Set of Books selected in the System Options window. All interaction with the Oracle Financials uses this operating unit and Set of Books. There can only be one combination of values.

Currency

If you are not using Oracle General Ledger, then you must define a functional currency. If you are using Oracle General Ledger, then currency is defaulted based on your Set of Books setup.

Include Planned Credits

Indicates planned credits in the Billing Extract Process considers planned credits and charges students for them.

Since the functionality of planned credits is being introduced in Student Finance, you must indicate whether to Include Planned Credits in the different places in Student Finance.

The following processes to decide whether to Include Planned Credits use this Include Planned Credits setup:

Billing Extract Process: Uses this setup information to determine whether the students planned credits are to be included in the billing extract along with the actual credits.

Apply Finance Holds: Uses this setup information to determine whether the students planned credits are to be considered along with the actual credits to determine whether a particular hold is applicable on a student.

Release Finance Holds: Uses this setup information to determine whether the students planned credits are to be considered along with the actual credits to determine whether a particular hold can be released from a student.

Finance and Late Fee Charges: Uses this setup information to determine whether the students planned credits are to be considered along with the actual credits to determine whether a Finance / Late Fee Charge is applicable on a student.

CAUTION: After you have defined the header level options and saved them, all options cannot be updated. The initial selection controls the operation of several windows and concurrent processes. Your only option is to reinstall the Oracle Student System.

Prerequisites

Oracle General Ledger is installed if you plan to use it.

Navigation

Student Finance > Setup > System > System Options

Additional Notes and Business Rules

Oracle General Ledger: Indicate if Oracle General Ledger is installed.

Manage Accounts: Indicate if you are using student finance account management or third party receivables account management.

Accounting Method: Enter **Cash** or **Accrual** to describe your accounting method.

Fee Calculation Method: Enter **Assess by Career**, **Assess by Primary Career**, or **Assess by Program** to describe your fee calculation method.

Set of Books: Enter a Set of Books name.

Currency:

- If you select **Yes** for the value for Oracle Financials and select a set of books in the Name field, then the currency attached to a particular set of books defaults in the Currency field. You cannot enter or update a value in this field if you indicate that Oracle Financials is installed.
- If you select **No** for value for Oracle Financials, then you can enter a value for the Currency field.
- After you save your work, you cannot update the value in the Currency field.

Include Planned Credits: Indicate if you want to include planned credits in the Billing Extract Process. When the value of this field is null, the value is considered to be **No** in all Student Finance processes and windows that use this field.

23.7.2 Setting Up Fee Posting Accounts IGSFI004

Enter account codes assigned to fee types to be recorded when charge transactions, credit transactions, and application of credits are created. These transactions originate in the Student Finance subsystem and then are passed to a general ledger interface table. This interface table can be used to support a custom interface process to transfer general ledger level transactions to a non-Oracle financial system.

The account code is a free text format field and can be made inactive by using the Closed check box. You cannot delete an account code.

This window is only available if Oracle Financials is set to **No**.

Prerequisites

Implementation of interface to non-Oracle financial system is complete.

Navigation

Student Finance > Setup > Accounting > Fee Posting Accounts

Additional Notes and Business Rules

Account Code: This field is a free text format field.

Deletion: You cannot delete an account code. It can be made inactive by selecting the **Closed** check box.

23.7.3 Setting Up Account Hierarchy IGSFI057

You can indicate the order, or hierarchy, in which entities are considered for individual accounting segments to arrive at a complete accounting flexfield. In the Account Hierarchy window, you can specify one account hierarchy as default at any time.

Account hierarchies are assigned for fee type calendar instances. For each possible fee type calendar instance, you can assign a uniquely defined hierarchy. This allows, for example, a situation in which full time tuition charges derive their accounting through a standard hierarchical process, but part time tuition charges derives their accounting specifically from one select level only, like a program or an organization. Therefore, you can build a different account hierarchy for a full time student and a part time student for tuition.

You cannot set up Account Hierarchies if Oracle General Ledger is set to **No** in the System Options window.

You can define a hierarchy with as many as seven levels and as few as one level. Available levels are:

- System options
- Program
- Unit
- Unit section
- Organization unit
- Location
- Fee type

You can place these in any order that you want.

This window can be used only if **Oracle General Ledger** in the System Options window is set to **Yes**.

Prerequisites

System options are set up.

Navigation

Student Finance > Setup > Accounting > Account Hierarchy

Additional Notes and Business Rules

Default: If selected, then account hierarchy is set as the default. Only one account hierarchy can be set as default.

Zero Fill: If selected, then build account package can fill incomplete segments after searching the entire hierarchy.

23.8 Setting Up Hierarchy Order IGSFI058

You can further define the order in which various entities are considered for a particular account hierarchy in the Hierarchy Order window. The entities to derive revenue account for a charge transaction can be chosen from unit section, location, fee type, program, organization, and units.

You must first establish an accounting hierarchy in the Accounting Hierarchy window. After you have established an accounting hierarchy, you can then enter the hierarchy order in the Hierarchy Order window. The Hierarchy Order window allows you to define the order in which to search for the attributes of a charge.

Prerequisites

Account hierarchy is set up.

Additional Notes

Sequence: The sequence is the order in which various entities are considered for a particular account hierarchy.

23.8.1 Setting Up System Options - Tabs IGSFI037

For each installation of the Oracle Student System, you can only set up student finance system options once. Return to this window to complete system options set up.

Refunds

You can define:

Accounting: Define the default accounts that are used for liability and clearing.

Refund Destination: Select the destination for the refund transactions created by student finance. The default is **Blank**.

- If the Oracle General Ledger option is set to **No**, then the refund destination cannot be **Oracle Payables**.
- If Multiple Organization has been enabled as part of the Oracle Financials installation and the refund destination is Oracle Payables, then the Oracle Payables operating unit option is required.
- The Oracle Payables operating unit is updateable as long as there are no records defined in the Supplier Relationship window.
- See the Supplier Relationship window section in the *Oracle Student System User Guide* for more information.

Oracle Payables: Refund transactions can be sent from Student Finance to Oracle Payables to disburse refunds and track refunds that have been processed. To do this, Oracle Payables must be implemented before setting up student finance.

- If Multiple Organization is enabled, then the operating unit used to perform the setup in Oracle Receivables must match the operating unit used in the Oracle Student System.
- **CAUTION:** If you do not have Oracle Payables installed, you must use third party software to disburse refunds. Oracle Student System calculates refunds and stores the transactions in an interface table, which are available for disbursement through a third party software.

Default Supplier Site Name: You must supply a default supplier site name when the refund destination is Oracle Payables. This will be used by the Transfer Refunds to Oracle Payables concurrent process when a new supplier site needs to be created.

Calendar Configuration

You can define the following date controls:

Refund Add Drop Cut Off Date: Define a date that prior to this date to prevent the refund process from creating refunds against the student account. If a student drops a class before this date, the student will not receive a refund prior to this date. After this date, the refund process creates a refund transaction.

Program Change Enforcement Date: Define a date so that any changes to the program after that date do not result in a fee assessment adjustment different than the refund date alias.

Oracle General Ledger Accounts

Define the following accounts used to support transactions that are transferred to either the Oracle or non-Oracle general ledger:

Cash: Define a single cash account

Unapplied: Define a single unapplied account

Oracle Receivables: Define a single receivables account

Revenue Segments

Define default values for accounting flexfield segments:

Oracle General Ledger installed: Define default values at the system level. These segment values build the accounting flexfield for all relevant transactions in which a segment value is not supplied at a lower level.

Prerequisites

System options (header information) is set up.

Navigation

Student Finance > Setup > System > System Options

Additional Notes and Business Rules

Liability Account Flexfield: This field is enabled when Oracle Financials is installed.

Liability Account Code: This field is enabled when Oracle Financials is not installed.

Clearing Account Flexfield: This field is enabled when Oracle Financials is installed.

Clearing Account Code: This field is enabled when Oracle Financials is not installed.

Refund Destination: If the **Oracle General Ledger** field is set to **No**, then **Oracle Payables** is not a valid value.

Oracle Payables Operating Unit: Enter which organization ID should be used to create the supplier site in Oracle Payables by the Supplier API called by the Transfer Refund to Oracle Payables concurrent process. This field required if the refund destination is set to **Oracle Payables** and the Oracle Applications Installation is Multiple Organization enabled. This field is disabled if the value in the **Refund Destination** field is **Blank** or **Other**.

Default Supplier Site Name: Enter supplier site names that match supplier site names in Oracle Payables. This field is required if the refund destination is Oracle Payables.

Configuring Oracle Payables for Oracle Student System:

- The payee must exist as a vendor in Oracle Payables or in a third party system. The vendor setup includes all the setup for vendor addresses, preferred payment method, payment terms, and pay to site.
- This setup enables student finance to send the information for the refund transaction to Oracle Payables. The borrower must exist as a party in Oracle Student System. See *Oracle Payables User Guide* for information about setting up Oracle Payables.

Transferring Payment Information from Refunds Interface Table to Refunds Table:

- Oracle Payables must be installed before setting up student finance. If Oracle Payables is the refund destination, the refund transactions move from the Refunds Table to the Oracle Payables Vendor and Invoice Tables. When the refund destination is **Other**, the refund transactions move from the Refunds Table to the Refunds Interface Table.
- If a supplier has not been created in Oracle Payables prior to running the transfer process, the transfer process creates the supplier if the process parameter is set to **Yes**.
- A credit balance is imported to the Oracle Payables open interface tables as a result of the refund assessment processing. The refund amount is placed on the student account for the amount of the refund and a record is created in an import file that is to be transferred to Oracle Payables through the Oracle Payables open interface tables.
- Student attributes become part of the electronic invoice or voucher record in Oracle Payables. After payment of the student refund invoice or voucher, attributes such as the voucher number and date, the check number and date, and payee or supplier information is exported from Oracle Payables back to Oracle Student System.

23.9 Revenue Accounting

The attributes required to be mapped to the Revenue Natural Account Segment (If Oracle General Ledger is set to **Yes** in the System Options window) / Revenue Account Code (If Oracle General Ledger is set to **No** in the System Options window) are as follows:

- Location
- Attendance Type
- Attendance Mode
- Program. Version
- Unit. Version
- Org Unit Code
- Residency Status
- Unit Section

Oracle General Ledger

If you are using Oracle General Ledger, the Segments tab is enabled in the Account setup windows. This tab is used to capture values for each revenue natural account segment. The segment values are used in the build accounts package to derive a complete revenue account.

For the fee types with the system fee type of **Tuition** and **Other**, in addition to the definition of the Account Hierarchy, Hierarchy Order, Accounts (Program, Location, Unit etc.), attaching Account Hierarchy to the fee type category instance, you can optionally define the account table in the Fee Type Accounts window for the fee type calendar instance.

If the account table is defined in the Fee Types Accounts window for the fee type calendar instance, then the build account package derives the Natural Account Segment value for the Accounting Flexfield from the Account Table definition. It does not use the existing Account Hierarchy functionality to derive it.

Non-Oracle General Ledger

You can translate the existing setup data for the Account Hierarchy, Hierarchy Order, Accounts (Program, Location, Unit etc.), and associate the Account Hierarchy to the fee type calendar instance to the setup of the account table if

system fee type is **Tuition** or **Other**, or Revenue Account Code for any other system fee type on the Fee Type Accounts window for the fee type calendar instance.

If you are using a non-Oracle general ledger system, the Accounts tab is enabled in the Fee Type Accounts window. Use this tab to define accounts.

If the fee type has a system fee type of **Tuition** and **Other**, since the account hierarchy functionality is not available, you must define an account table.

For the fee types with the system fee type that is not **Tuition** or **Other**, the account table tab definition is not available. The build account package selects the revenue account code from the **Revenue Account Code** field on the Fee Type Accounts window for the fee type calendar instance.

When Oracle General Ledger is set to **No** and the fee type with the system fee type is not **Tuition** or **Other**, you must define the **Revenue Account Code** field.

23.9.1 Setting Up Program Accounts IGSFI059

Define segment values or accounts for the revenue account for a selected program if Oracle General Ledger is set to **Yes** in the System Options window.

If the Oracle General Ledger is **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for a selected program.

You must set up program accounts if you have included them in the accounting hierarchy order.

Prerequisites

System options are set up.

Programs are set up.

If you are using Oracle General Ledger, it is implemented and setup is complete.

Organizational units are set up.

Navigation

Student Finance > Setup > Accounting > Accounts > Program Accounts

23.9.2 Setting Up Unit Accounts IGSFI060

Define segment values or accounts for the revenue account for a selected unit if Oracle General Ledger is set to **Yes** in the System Options window.

If the Oracle General Ledger is **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for a selected unit.

After setting up program accounts, you must set up unit accounts in if you have included them in the accounting hierarchy order.

Prerequisites

System options are set up.

Units are set up.

If you are using Oracle General Ledger, it is implemented and setup is complete.

Navigation

Student Finance > Setup > Accounting > Accounts > Unit Accounts

23.9.3 Setting Up Unit Section Accounts IGSFI061

Define segment values or accounts for the revenue account for a selected unit section if Oracle General Ledger is set to **Yes** in the System Options window.

If the Oracle General Ledger is **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for a selected unit section.

Prerequisites

System options are set up.

Unit Sections are set up.

If you are using Oracle General Ledger, it is implemented and setup is complete.

Navigation

Student Finance > Setup > Accounting > Accounts > Unit Section Accounts

23.9.4 Setting Up Organization Accounts IGSFI062

Define segment values or accounts for the revenue account for a selected organization account if Oracle General Ledger is set to **Yes** in the System Options window.

If the Oracle General Ledger is **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for a selected organization account.

After you have set up location accounts, you must set up the organization accounts accounts if you have included them in the accounting hierarchy order.

Prerequisites

System options are set up.

Organization units are set up.

If you are using Oracle General Ledger, it is implemented and setup is complete.

Navigation

Student Finance > Setup > Accounting > Accounts > Organization Accounts > Organization Accounts

23.9.5 Setting Up Location Accounts IGSFI063

Define segment values or accounts for the revenue account for a selected location account if Oracle General Ledger is set to **Yes** in the System Options window.

If the Oracle General Ledger is **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for a selected location account.

Prerequisites

System options are set up.

Locations are set up.

If you are using Oracle General Ledger, it is implemented and setup is complete.

Navigation

Student Finance > Setup > Accounting > Accounts > Location Accounts

23.10 Fee Structure

Fee structure is the setup of fee types, categories, triggers, and schedules that determine how fees are assessed at your institution.

Calculation and schedule data can be stored at various levels, and each level determines the scope of a fee. Different windows and self-service pages allow access to data at one of the levels.

For example, a computer access fee with fee type **Comp-Acc** is assigned to two fee categories, **Intrntl-Ug** and **Domestic-Ug**, and charged at a flat rate of \$75 in the **Fee-Sem1** fee period.

If the rate is entered using the Fee Types window, the rate applies to both the **Intrntl-Ug** and **Domestic-Ug** fee categories and to students in both these fee categories.

If the rate is entered using the Fee Category Calendar Instance window with the **Domestic-Ug** fee category selected, the rate only applies to students in the **Domestic-Ug** fee category.

Fee Data and Fee Type Levels

The following describes fee data and fee type levels.

Schedules: Template schedule from which dates can be derived after which your institution retains all or a proportion of an amount assessed for a fee, in the event that a student's liability reduces on reassessment. By implication, amounts paid and not retained are available for refund. This can be set up for fee types, fee categories, and fee liabilities.

- For fees with an **Institution** trigger category, schedules must be set up to operate for fee types. In these cases, if fees do not have a schedule set up to operate for fee types, they cannot have other schedules, even if they are included in a fee category.
- If a fee type has a schedule set up to operate at the for fee types, another schedule cannot be set up to operate at for fee liabilities
- If a fee type has a schedule set up to operate for fee types, this schedule overrides one set up to operate for fee categories for that fee type only.
- If a fee type has a schedule set up to operate for fee liabilities, this schedule overrides one set up to operate for fee categories.

Charge method: Describes the methods for determining the number of charge elements for use in a fee calculation. The options are **Flatrate**, **EFTSU**, **Perunit**, **Crpoint**. Can be set up for either fee types, fee categories, or fee liabilities. The charge method and the rule have the same set up.

Payment rank: Can be set up for either fee types, fee categories, or fee liabilities.

Rule: Use the seeded rule for fee assessment Rule 351. You should not define a rule for fee assessment. Can be set up for either fee types, fee categories, or fee liabilities.

Rate: Describes a per element rate applying to a fee. Can be set up for either fee types, fee categories, or fee liabilities.

- Fees with an **Institution** trigger category must have calculation details set up to operate for fee types.
- Charge rate and element ranges must be set up to operate at the same level.
- Rates can be differentiated by level, by any combination of location, attendance type, and attendance mode.
- If location, attendance type, and attendance mode attributes do not make rates mutually exclusive, an order of precedence must be set.

Element ranges: Range delimited by lower and upper values against which a rate can be recorded to apply only to students with study loads within that range. Can be set up for either fee types, fee categories, or fee liabilities.

- Element ranges cannot be specified for a fee if the charge method is **Flatrate**.
- The element range can only be set up to operate for fee types for institution fees.

Define trigger type: Recorded against a fee liability, which are matched against a student's program attempt in order to determine if a student is liable for the particular fee. Can be set up for fee types, fee categories, and fee liabilities. Fees with an **Institution** trigger category do not have triggers, can use any charge method, must have all their details set up to operate for fee types. These fees are levied only once even if a student has more than one current program attempt.

Use triggers: Not applicable to **Institution** trigger category

Fee Type Rates

Rates refer to standard contract rates established through the Fee Assessment Rates window and not contract rates established with individual students in the Contract Fee Assessment Rates window.

Fee type rates are set up in the Fee Assessment Rates window, accessed from the Fee Types window, or from the Fee Category Fee Liability window.

Students are assessed charges based on their unique characteristics and how those characteristics match against attributes that exist in a rate table in Oracle Student System. This rate table is created through the Fee Assessment Rates window based on user-defined values.

Note: If the criteria entered for a fee type rate do not cover all options, you can enter additional fees in the Ancillary Rates window and Ancillary Segment window. You can enter additional external charges in the External Charges window.

Multiple rates can be specified for a single fee type, depending on the following rate variables:

Organization unit code

If the **Organization** field of the Fee Assessment Rates window is populated, Oracle Student System determines which organization the unit is associated with and calculates the fee based on the rate associated with that organization. By setting a higher fee assessment rate, for example, **Tuition**, as compared to **Library Fine**, a payment or credit to the student's account will first pay the **Tuition** rate in full before any portion will be paid for the **Library Fine** rate. An application hierarchy in only for OTC receipts and credits.

Location code

Oracle Student System uses location codes at different levels, such as program location code and unit location code, for different cases of fee data. For fee types triggered when students meet institution setup, the accounting is done based on location codes at different levels such as program location code and unit location code for different cases of fee data. For fee types with the trigger category of **Institution**, the charge rate varies for individual units even when the units are in the same program attempt because charge rate is a function of organization unit and location code, both of which can vary depending on unit setup.

Residency

Residency types are values for students who are residents or non-residents of the location of your institution. Oracle Student System checks residency types, and if there are values associated with the residency attribute, then the charge rate associated with the attribute is assessed, depending on the residency code found in the person's record.

Enrollment Attributes

Certain combinations of criteria are mutually exclusive, for example, two rates with the values full-time and part-time set up with attendance type as the only criterion. However, some combinations of criteria are not mutually exclusive. In these instances, the system follows an order of precedence value given to each criteria combination.

Attendance Type and Attendance Mode

The following list indicates all possible mutually exclusive criteria combinations:

- Only criterion is location code, and a rate is given for each possible value of location code
- Only criterion is attendance type, and a rate is given for each possible value of attendance type
- Only criterion is attendance mode, and a rate is given for each possible value of attendance mode
- Criteria are location code and attendance type only, and a rate is given for each possible combination of values of the two criteria
- Criteria are location code and attendance mode only, and a rate is given for each possible combination of values of the two criteria
- Criteria are attendance type and attendance mode only, and a rate is given for each possible combination of values of the two criteria
- Criteria are location code, attendance type, and attendance mode, and a rate is given for each possible combination of values of the three criteria

All other combinations must specify an order of precedence value.

You can set up one rate for programs studied at any location and for any attendance type or mode, and other rates with particular criteria for a limited number of exceptions. For example, one rate can be set up for all options, a second rate can be specified for full-time students at Campus A, and a third rate for on-campus students at Campus B. The exceptional cases must be set up to take precedence over the general case.

The order of precedence for exceptional cases can be reversed, but the general case must always be listed last. If the general case were listed first, then the exceptional cases would never take effect.

An empty criterion field in the Fee Assessment Rates window indicates that the rate applies for any value of that criterion.

Nominated and Derived Program Attributes

For some enrolled students, the values for attendance type and attendance mode values can vary based upon whether is nominated from the values obtained by examining individual unit enrollments for the program. For example, a student program attempt can have an off-campus attendance mode entered, but for a majority of units, the student can study on campus.

Program Fee Triggers

Program fee triggers can be created in the Program Fee Trigger window to match any or all location, attendance type, and attendance mode attributes of a program attempt. The program fee triggers are matched to nominated program attempt attributes and if a match is made, the student must pay the fee.

Single Program Attempt Fees

A fee with a trigger category of **Program**, **Unit**, **Unit Set**, or **Composite** relates to a single program attempt.

A rate with a location specified is matched against a nominated location of the student program attempt and the unit location.

A rate with an attendance mode and attendance type specified is matched against a derived attendance type or mode of the student program attempt. This depends on whether nominated or derived values are used.

The derived attendance mode is determined as follows:

- For a student program attempt to match a rate for user-defined value equivalent to on-campus attendance, all units must be on-campus
- For a student program attempt to match a rate for a user-defined value equivalent to off-campus attendance, all units must be off-campus
- If neither of these conditions is met, then a rate for a value equivalent to multi-modal attendance applies

The derived attendance type, in which the fee period is associated with only one load calendar in the Calendar windows, is determined as follows:

- For a student program attempt to match a rate for a user-defined value equivalent to full-time, the sum of the Effective Full Time Student Units for each unit must be within the range you specify as a full-time load for that load calendar in the Program Attendance Types window
- For a student program attempt to match a rate for a user-defined value equivalent to part-time, the sum of the Effective Full Time Student Units for each unit must be within the range you specify as a part-time load for that load calendar in the Program Attendance Types window

Multiple Program Attempt Fees

When a student is enrolled in more than one program, an assessment for an institution fee must take into account all program attempts in which a student is enrolled when determining the rate.

A rate with a location specified is matched against a nominated location of the **major program attempt**. The **major program attempt** has greatest sum of the unit Effective Full Time Student Units for the student or, if program attempts have equal Effective Full Time Student Units values, the program with the earliest commencement.

A rate with an attendance mode or attendance type specified is matched against a derived attendance type or mode of the major program attempt.

The derived attendance mode for each program is determined for fees with a Program trigger category, and then the following criteria are applied:

- If all programs are on-campus, the on-campus rate applies
- If all programs are off-campus, the off-campus rate applies
- If neither of these criteria is met, a rate for multi-modal attendance applies

The derived attendance type for each program is determined by adding the unit Effective Full Time Student Units for all program attempts and matching the sum to either the load calendar attendance type range or the academic period attendance type range.

Class Standing

You can also assess fees based on the student's year in school, or class standing. For example, a freshman can be billed tuition at one rate and a sophomore may be billed tuition at a different rate.

Class standing is determined at the career level for a student. If a student has more than one program, then the class standing used for rate calculation is at the career level for the primary program.

If there is more than one career, then there will be more than one class standing. However, since there will be one primary program, and thus a primary career, rates that are dependent on class standing will be assessed using the class standing of the primary program.

Institution

Institution fees, fees that have a system fee trigger category of **Institution**, are levied only once across all enrollments. This means that a single fee type assessment applies across a student's enrollment regardless of the number of courses enrolled and the fee category assigned to each of the courses.

All student course attempts are grouped and assessed together that meet the following criteria:

- Fee type is a liability under fee category
- All fee categories are operational in the same fee calendar instance

If the charge methods are not **Flatrate**, then unit enrollments under all considered programs are grouped for the charge elements calculation. If the charge method is **Flatrate**, then assessment is by element ranges.

Institution fees are independent of program attempts and fee categories assigned to each program attempt of the student. The fee type for **Institution** fees can be assessed using all charge methods. These charge methods can vary across the course attempt fee categories.

Fee Triggers and Fee Liabilities

A trigger is the name given to one or more programs, units, or groupings of programs and units, including unit sets, when they are associated with a fee within a specific fee category. If fee assessment matches a particular student's program, unit set, and unit attempts to a trigger, the student in that fee category is assessed the corresponding fee.

Setting up triggers requires the following prerequisites:

- A trigger category must first be entered for each fee type in the Fee Types window
- Triggers must be associated with fee liabilities by accessing one or more of the trigger windows

Trigger Categories

Trigger windows are used to select the appropriate trigger or triggers for a fee liability.

- **Program:** Used when only a single program, a single method of studying a program, or a small number of programs are associated with a fee. The other windows allow various sets of programs to be associated with a fee. These sets of programs are defined in the Program Structure and Planning subsystem using the Program Groups window for program groups, and the Program Types window for program types.
- **Unit:** Set up Unit triggers that associate a fee with an individual unit or units. Associating a fee with a unit or units depends on when and where the unit is studied.
- **Unit Set:** Associates a fee with a particular unit set.

- **Composite:** Associates a fee with a trigger group, including a program, one or more unit sets, and one or more units. All components of the trigger group must match the student's enrollment for the Composite trigger to take effect. A Composite trigger can be set up to take effect if any one of its components is present.
- **Audit Fees:** Associates a fee with audited unit sections. This fee trigger category can only be attached to a fee type with the system fee type of **Audit Fees**.
- **Special Fees:** This trigger with has trigger effect because the Special Fees fee type cannot be attached to a fee category calendar instance as a fee liability

Trigger groups are entered in the Fee Trigger Group window. The number of the group is entered in the Program Fee Trigger window for programs, in the Unit Set Fee Trigger window for unit sets, and in the Unit Fee Trigger window for units.

Institution Fee Categories

The institution fee category has no triggers since fees in this category apply throughout the institution to any eligible student.

Ancillary Charges

Ancillary charges are charges that originate in offices outside of the student finance office but are unrelated to students' tuition. Examples of ancillary charges include housing and dining expenses.

Fee types represent charges from ancillary operations. Each **Ancillary** fee type must be associated with a fee calendar and must be part of the fee type calendar rollover functionality.

Charges assessed against the **Ancillary** fee type are created through lookups and through a manual process which permits you to assess ancillary charges for an individual student.

Prior to assessing the ancillary rate, you must determine if there are dependences among multiple rates. If there are dependencies, you must determine how to enter these rates. For example, if a board charge is dependent on a room charge, then a rate table needs to accommodate both room and board attributes in each of the rates.

Fee Disbursement Rules

Rules for fee disbursement are unique to the fee type, calendar type, and fee disbursement formula number. The rule description determines the available syntax and returns Boolean true or false to Oracle Student System. The fee disbursement

rules determine if a fee disbursement formula applies to a student or a program. Fee disbursement rules are viewed in the Fee Disbursement Formula Rules window.

The following table describes fee disbursement rule operators.

Table 23–1 Fee Disbursement Rule Operators

Syntax / Operator	Definition	Example	Result
=	Equal to	Sex = Male	Returns true if gender of student is male
< >	Not equal to	Sex < > Male	Returns true if gender of student is not male, that is, gender is female or unknown
()	Parentheses	(Sex < > Male AND Sex < > Unknown)	Returns true if sex is female, otherwise false
AND	Logical and	(Sex < > Male AND Sex < > Unknown)	Returns true if sex is female, otherwise false
OR	Logical or	(Sex < > Male OR Sex < > Female)	Returns true if sex is male, female, or unknown

The following table describes fee disbursement rule parameters.

Table 23–2 Fee Disbursement Rule Parameters

Parameter	Description	Current Value
Sex	Returns gender of student	Male, Female, Unknown

23.11 Setting Up Fee Structures - Overall Procedure

Setting up fees includes the following procedures and subprocedures:

Setting Up Fee Structure Statuses IGSFI001

Setting Up Fee Types IGSFI012

1. Setting Up Fee Type Calendar Instances IGSFI012
 - a. Setting Up Fee Assessment Rates - Fee Type IGSFI021
 - b. Setting Up Fee Type Accounts IGSFI064
 - c. Setting Up Ancillary Segments IGSFI039
 - Setting Up Ancillary Rates IGSFI040
2. Setting Up Retention Schedules - Fee Type IGSFI024
3. Setting Up Element Ranges - Fee Type IGSFI020

Setting Up Fee Category Calendar Instance IGSFI019

1. Setting Up Retention Schedules - Fee Category IGSFI024
2. Setting Up Fee Category Fee Liabilities IGSFI019
 - a. Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
 - b. Setting Up Fee Triggers
 - Setting Up Program Group Fee Triggers IGSFI014
 - Setting Up Program Fee Trigger IGFSI015
 - Setting Up Program Type Fee Triggers IGSFI013
 - Setting Up Unit Fee Trigger IGSFI016
 - Setting Up Fee Trigger Group IGSFI017
 - Setting Up Program Fee Trigger - Composite IGSFI015
 - Setting Up Unit Fee Trigger - Composite IGFSFI016
 - Setting Up Unit Set Fee Trigger - Composite IGSFI018
 - Setting Up Unit Set Fee Trigger IGSFI018
 - c. Setting Up Fee Assessment Rates - Fee Category IGSFI021
 - d. Setting Up Element Ranges - Fee Category IGSFI020

23.12 Setting Up Fee Structure Statuses IGSFI001

Map user-defined fee structure statuses to system fee structure statuses of **Active**, **Inactive**, and **Planned**. Fee structure statuses reflect the active, inactive, or planned activity of a fee at different levels.

Statuses are entered in the Fee Types window for a fee type in any category (fee type calendar instance). Statuses are entered in the Fee Category Calendar Instance window for all fee types in a fee category (fee category calendar instance) and a single fee type in a particular category (fee category fee liability).

RECOMMENDATION: Enter user-defined statuses with the system values **Active**, **Inactive**, and **Planned**.

Navigation

Student Finance > Setup > Fees > Fee Structure Statuses > Fee Structure Statuses

Additional Notes and Business Rules

Changing statuses: You can change the status of any unused fee type calendar instance attribute to **Inactive** or **Planned**. You cannot delete these attributes.

23.13 Setting Up Fee Types IGSFI012

Fee types are user-defined classifications of fees. Map user-defined fee type to system fee types and set fee triggers for each fee type.

To charge a processing fee to administer a payment plan, you must create a user-defined fee type that is mapped to a system fee type of Payment Plan.

Fee types marked for designated payments appear as options in self-service that students can prioritize and pay. For example, the fee administrators selects the designated checkbox for the tuition fee type, the parking fee type, and the library fee type. All these fee types will appear as options for which the student can make designated payments.

Set up **Tuition**, **Ancillary**, **External**, **Sponsor**, and **Other** fee types.

Prerequisites

Fee structure statuses are set up.

Navigation

Student Finance > Setup > Fees > Fee Types > Fee Types

Steps

1. Enter the fee type name and select the system fee type from the list.

Note: Institution fees (fees that have a system fee trigger category of institution) are levied only once across all enrollments. This means that a single fee type assessment applies across a student's enrollment regardless of the number of courses in which the student is enrolled and the fee category assigned to each of the courses.

2. Select the system fee trigger category to indicate if fees assessment is done at the institution, program, unit, composite or unit set level.
3. Enter the description of the fee type you created.
4. Select **Designated Payments** if you want the fee type to be available as an option for designated payments in self-service or lockbox. Save your work.
5. Perform the procedures below to complete setting up fee types:
 - a. Setting Up Fee Type Calendar Instances IGSFI012
 - Setting Up Fee Assessment Rates - Fee Type IGSFI021
 - Setting Up Fee Type Accounts IGSFI064
 - Setting Up Ancillary Segments IGSFI039
 - Setting Up Ancillary Rates IGSFI040
 - b. Setting Up Retention Schedules - Fee Type IGSFI024
 - c. Setting Up Element Ranges - Fee Type IGSFI020

Additional Notes and Business Rules

Mandatory fee types: Fee types created with **Payment Plans** fee type cannot be made optional.

Mandatory charges: Any charges created with **Payment Plans** fee type cannot be declined.

Restrictions for Payment Plans fee type: Fee types created with **Payment Plans** fee type are limited to the institutional fee trigger only. Fee types created with **Payment Plans** fee type can only be associated with flat rate assessment. In the Fee Type Calendars Instance window, the following buttons are disabled for fee types with **Payment Plans** fee type:

- Retention Schedule
- Ancillary Rates

- Element Ranges

System Fee Trigger Category: This field restricts the type of fee triggers used to match a student program, unit, audited unit, or unit set attempt to a fee for which students in a particular category are liable.

Optional Payment: If selected, then a fee is not mandatory and no debt management is applicable. If selected and the system fee type is **Finance Charge, Late Charge, Sponsor, Aid Adjustment, Document, Payment Plan, or Refunds**, then an error message is displayed that the Optional Payment check box cannot be set for this system fee type and you cannot save the record.

Designated Payment: If selected, then students can designate a payment specifically for charges with this fee type, and bypass the application hierarchy. Students can make a payment specifically for charges with this fee type in the self-service pages or using the lockbox. To allow students to pay for fee types with designated payments using the lockbox, you must make charges of this type visible to the student in the remittance slips that are sent out with the bill. Any receipts via the lockbox that has a charge number specified will be validated against the fee type setup.

23.13.1 Setting Up Fee Type Calendar Instances IGSFI012

You set up fee types and fee categories independently, and then assign fee types to the categories. One fee type can be included in many categories. Only fees assigned in this way are available for assessment. A single fee type within a fee category is known as a **fee liability**.

After you define a fee type, attach it to a fee type calendar instance. A calendar instance contains the start and end date of an academic period. A fee type attached to a calendar instance is known as **fee type calendar instance**.

Prerequisites

Fee periods are set up.

Date aliases are set up.

Account hierarchy is set up.

Calendar relationships are set up.

Navigation

From previous procedure (Setting Up Fee Types IGSFI012): Click Fee Type Calendars.

From Navigator: Student Finance > Setup > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendars Instances

Additional Notes and Business Rules

Initial Default Amount: Fees administrators can specify an Initial Default Amount to be assessed every time the Fee Assessment concurrent process is run. For this to happen, the Initial Processing Mode parameter for the Fee Assessment concurrent process must be set to Initial Mode with Default Mode.

Account Hierarchy: If Oracle General Ledger is set to **No** in the System Options window, the **Account Hierarchy** field in the Fee Type Calendar Instance is disabled.

Audit Fees: Any charge method can be selected and an initial default amount can be defined.

23.13.1.1 Setting Up Fee Assessment Rates - Fee Type IGSFI021

Fee assessment rates are rates you set up for a fee type for a particular teaching period or fee type calendar instance. Fee assessment rates are used by the Process Fee Assessment Landscape and Process Fee Assessment From To Do Entries concurrent processes.

The enrollment attributes determined by the Fee Assessment process are compared with the rates attributed to determine the rate value to be used for assessment. In determining applicable charge rates, program attributes in the Fee Assessment Rates window are matched to nominated student program attempt attributes in cases in which the assessment is predictive and the student is not currently enrolled for the fee calendar instance concerned or the derived student program attempt attributes for enrolled students.

The fee type calendar instance associated with the system fee type **Document** has an account hierarchy defined only with the fee type entity. If there is a change in an organizational unit when the Process Fee Assessment Landscape concurrent process is rerun, Oracle Student System reverses the original transaction and creates a fresh transaction with the new changed organization unit, even if there is no change in the final assessment amount.

Levels

Assessment rate data can be attached for fee types, in which rates for a fee apply regardless of category, or for fee liabilities, in which the rate or rates apply to the fee only within the category selected. Fees with a system fee trigger category of **Institution** must be specified only for fee types because these fees are levied once

across all the program attempts of students at the institution, regardless of their fee category.

Other than fees with a system fee trigger category of **Institution**, rates can exist at either level but not at both levels for the same fee type.

If you want to set up assessment rates for fee types, access the Fee Assessment Rates window as by clicking the **Assessment Rates** button in the Fee Type Calendar Instances window.

If you want to set up assessment rates for fee liabilities, access this window by clicking the **Fee Calculations** button and then **Fee Type Calendar Instance Assessment Rate** button in the Fee Category Fee Liability window. The Fee Assessment Rates window can be accessed for fee liabilities, but only to display the existing data.

Multiple Rates

Multiple charge rates can be set up for a single fee depending on various enrollment attributes such as location, attendance type, attendance mode. For example, the rate of a general service fee may depend on the location where a student is studying. When setting up these attributes, you must enter all of the circumstances for which students must pay the fee.

Unit Set Rates

Defining rates by unit sets is only supported in the context of UK institutions defining rates for years of program. Rate definition for other types of unit sets is not supported.

In order for UK institutions to enable this feature, you must set the **Fee Calculation Method** field in the System Options window to **Assess by Program**.

Prerequisites

Fee periods are set up.

Location codes are set up.

Attendance types are set up.

Attendance modes are set up.

Class standing is set up.

Program is set up.

Organization is set up.

Residency statuses are set up.

System options are set up and **Fee Calculation Method** is set to **Assess by Program**.

Basic unit set details are set up.

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Assessment Rates**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendars Instance > Assessment Rates > Fee Assessment Rates

Click **Back** to return to the Fee Category Fee Liability window.

Additional Notes and Business Rules

Audit Fees: For audit fees, different fee assessment rates can be defined based on the combination of multiple attributes such as Attendance Type and Location.

Unit sets representing a year of program: You can rate definitions only for unit sets that represent a year of program. Other unit sets, such as those that represent streams or area of concentration are not supported in the rate definitions.

Currency: If nothing is displayed in this field, local currency applies to any rate entered and can be found in the International Currency Codes window.

Include deleted rates: If selected, then deleted rates are displayed. If rates are deleted, any dependent element range rates are also logically deleted.

Order of Precedence: Fees can have rates that vary according to changes in the attributes location code, attendance type, and attendance mode. When any of these attributes are used to define a rate, and these attributes are not mutually exclusive, an order of precedence must be specified. For example, a rate with the precedence number 1 is used in preference to one with the precedence number 2, in cases for which both can apply.

Unit Set: Enter a unit set code. Valid unit sets are of type **Pre-Enrollment Year** with a system type of **Active** or **Planned**.

- Unit sets represent years of program for UK functionality.
- This field is disabled when **Fee Calculation Method** in the System Options window is **Assess by Career** or **Assess by Primary Career**.

- This field is disabled when the system fee trigger category for this fee type is **Institution**.

Special Fees system fee type:

- The charge method can only be **Flatrate**.
- The **Assessment Rates** button is disabled.
- The **Element Ranges & Ancillary Rates** button is disabled.

Account Hierarchy: If Oracle General Ledger is set to **Yes** in the System Options window, then this field is enabled. If Oracle General Ledger is set to **No** in the System Options window, then this field is disabled.

23.13.1.2 Setting Up Fee Type Accounts IGSFI064

Enter the segment value for the revenue account for the fee type calendar instance if Oracle General Ledger is set to **Yes** in the System Options window.

If Oracle General Ledger is set to **No** in the System Options window, then the account table in the Fee Type Accounts window is used to define the revenue account code for the fee type calendar instance.

This setup is required if you are defining revenue account segments, retention accounts, and receivable accounts at the fee type level and is applicable to all system fee types.

Account Conversion Process

By running the Account Conversion Process concurrent process, you can translate the existing setup data for the account hierarchy, hierarchy order, and accounts. You can also associate the account hierarchy to fee types to the setup of the account table (if the system fee type is **Tuition** and **Other**) or revenue account code (for any other system fee type).

To run this concurrent process, system options and account hierarchy must be set up, and Oracle General Ledger must be set to **No** in the System Options window.

Prerequisites

If you are using Oracle General Ledger, accounting flexfield structure is set up.

If you are using a non-Oracle general ledger system, accounting structure is set up.

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click Accounts.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendar Instances > Accounts > Fee Type Accounts

Additional Notes and Business Rules

Retention: The revenue account used for retention is different from the normal revenue account and is defined separately in the Fee Type Accounts window. This can be a Oracle General Ledger Account Flexfield or an Account Code defined in the Fee Posting Accounts window.

Sequence: Enter the order in which the rows defined in the Account Table Tab are processed by the build account package to derive the natural account segment/revenue account code.

Natural Account Segment: Valid values for this field include values defined in the value set and attached to the particular segment of the accounting flexfield (key flexfield), which has the flexfield qualifier, natural account segment set to **Enabled** and the segment qualifier of account type is set to Revenue. This field is enabled if the Oracle General Ledger in the System Options window is set to **Yes**.

Revenue Account Code: This field is enabled if the Oracle General Ledger in the System Options window is set to **No**.

Charge method: If the charge method for a fee type calendar instance is **Flatrate**, then the attributes unit and unit section are not considered by the build account package to derive the revenue account.

Oracle General Ledger is set to Yes in the System Options window and the Fee Type in context has System Fee Type of Tuition, Audit, or Other:

Available for set up:

- Oracle Receivables and Retention Account flexfield
- Segments Tab
- Account Table tab (If this tab is set up then the build account package derives the natural account segment value from the Account Table tab and not from the account hierarchy attached to the fee types)

Disabled:

- Account Codes (Oracle Receivables, Retention, Revenue)

- Revenue Account Code column in the Account Table tab

Oracle General Ledger set to Yes in the System Options windows and the Fee Type in context has System Fee Type of other than Tuition, Audit, or Other:

Available for set up:

- Oracle Receivables and Retention Account flexfield
- Segments Tab

Disabled:

- Account Table tab
- Account Codes (Oracle Receivables, Retention, Revenue)

Oracle General Ledger is set to Yes in the System Options window and the Fee Type in context has System Fee Type of Tuition, Audit or Other:

Available for set up:

- Oracle Receivables and Retention Account flexfield
- Segments tab
- Account Table tab (If this tab is set up then the build account package derives the natural account segment value from the Account Table tab and not from the account hierarchy attached to the fee types)

Disabled:

- Account Codes (Oracle Receivables, Retention, Revenue)
- Revenue Account Code column in the Account Table tab

Oracle General Ledger set to Yes in the System Options window and the Fee Type in context has System Fee Type of other than Tuition, Audit, or Other:

Available for set up:

- Oracle Receivables and Retention Account flexfield
- Segments tab

Disabled:

- Account Table tab
- Account Codes (Oracle Receivables, Retention, Revenue)

Oracle General Ledger set to No in the System Options window and the Fee Type in context has System Fee Type of Tuition, Audit, or Other:

Available for Setup:

- Oracle Receivables and Retention Account Codes
- Account Table tab

Disabled:

- Account Flexfields (Oracle Receivables, Retention)
- Revenue Account Code
- Natural Account Segment column in Account Table tab
- Segments tab

Oracle General Ledger set to No in the System Options window and the Fee Type in context has System Fee Type of other than Tuition, Audit, or Other:

Available for set up:

- Oracle Receivables and Retention Account Code
- Revenue Account Code

Disabled:

- Account Flexfields (Oracle Receivables, Retention)
- Account Table tab
- Segments tab

23.13.1.3 Setting Up Ancillary Segments IGSFI039

Define ancillary segments for a particular fee type calendar instance. To define ancillary rates for an ancillary segment, click **Rates** on the Fee Types window. To calculate the ancillary charges, run the Import and Calculation of Ancillary Charges concurrent process. If some ancillary attributes are not defined, you will get an error message. Open the Ancillary Charges Error Resolution window to delete records. You cannot delete a record from the Ancillary Charges window.

Prerequisites

Fee calendars are set up.

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click Ancillary Rates.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendar Instances > Ancillary Rates > Ancillary Segments

Additional Notes and Business Rules

Ancillary Rates: The button is active only for ancillary rate types. It is disabled for the fee type of **Audit**.

23.13.1.3.1 Setting Up Ancillary Rates IGSFI040 Set up rates for different combinations of ancillary segments.

You can use the ancillary rates to calculate the ancillary charges of a particular student if he or she has multiple ancillary charges. Examples of ancillary charges include dining and housing.

Prerequisites

Fee calendars are set up.

Ancillary segments are set up.

Navigation

From previous procedure (Setting Up Ancillary Segments IGSFI039): Click **Rates**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendars Instances > Ancillary Rates > Ancillary Segments > Rates > Ancillary Rates

Additional Notes and Business Rules

Enabled: If selected, then the combination of segments are enabled in the Ancillary Segments window.

Rate: The ancillary rate amount cannot be negative.

23.13.1.4 Setting Up Retention Schedules - Fee Type IGSFI024

Specify the date after which your institution retains a specified portion of an assessed fee. A retention schedule is designed to operate in circumstances when, prior to a teaching period census, a student's liability for a fee reduces. This can happen if the student withdraws from one or more units or discontinues program enrollment altogether.

Entries in the Retention Schedule window define a portion of the fee liability that is to be retained after reassessment even though students have reduced their enrollment load.

Retention can be specified as a percentage of a prior liability or as a fixed amount that applies equally to paid and unpaid student fee liabilities. If a student's liability is reduced after payment is made, any refund due equals the balance after retained amounts have been subtracted. For unpaid amounts, debt recovery applies to the amount retained.

If the unit discontinuation criteria is correctly established, retention schedules do not operate if a student discontinues or reduces enrollment after the teaching period census. When a student withdraws after the census, the load has already been incurred and any assessed fees typically remain due for payment.

The Fee Calendar Instances region identifies the fee period and level for which the schedule is relevant. For a schedule for fee types, the **Fee Category** field is blank. For fee categories, the **Fee Type** field is blank. For fee liabilities, there are entries in both the **Fee Type** and the **Fee Category** fields.

Warnings advising that exceptions exist at another level are shown for fee liabilities if, for any fee in the category, a schedule exists for either fee types or fee categories that overrides the fee liability schedule for that fee or institution fee included in the category.

Schedule Entries

One or more records are entered in a retention schedule. Each entry represents a particular date after which the corresponding retention conditions apply. Generally, the amount or percentage retained increases as the fee period progresses. The effective date of the Process Fee Assessment concurrent process is compared to the dates in the schedule, to decide which entry is applicable to reassess a student's liability.

Levels and Overrides

Though retention schedules can be specified at three levels, it can be concurrently run for two situations. The combinations are:

- Fee types and fee categories concurrently, in which case the schedule for fee types overrides the fee categories schedule for the corresponding fee only
- Fee categories and fee liabilities concurrently, in which case the schedule for fee liabilities overrides the fee category schedule for the corresponding fee only

In both of these cases, fees without schedules for fee types or fee liabilities have retention applied according to the category schedule for fee liabilities, even if they are in a group with other fees for which an override applies. If a fee is not covered by a schedule at any level, retention does not apply.

Institution Fees

Fees with a system fee trigger category of type **Institution** can have retention schedules defined only for fee types.

CAUTION: For institution fees, the fee assessment routine takes no account of schedules at any other level. Lack of a schedule for fee types means that no schedule exists, and therefore that no retention applies. This is so, even in cases in which a category that includes the corresponding fees as liabilities has a schedule attached.

Level Access

The Fee Retention Schedules window is accessed as follows:

- Fee types by the **Retention Schedule** button in the Fee Type Calendar Instances window
- Fee categories by the **Fee Retention Schedule** button in the Fee Category Calendar Instances window
- Fee liabilities by the **Fee Retention Schedule** button or the **Fee Type Calendar Instance Retention Schedule** button in the Fee Category Fee Liability window

The **Fee Type Calendar Instance Retention Schedule** button is displayed when a schedule exists for fee types. The window can still be accessed for fee liabilities, but only to display the existing fee types schedule.

Example 1

You apply a fee retention and refund policy to tuition fees:

Semester 1

- Discontinuation up to and including 31-DEC of the preceding year: Nil retention. 100% refund of fees paid.
- Discontinuation between 01-JAN and up to the start of teaching: 50% retention of assessed fees. All monies in excess of 50% refunded.
- Discontinuation between the start of teaching and the teaching period census: 80% retention of assessed fees. All monies in excess of 80% refunded.

- Discontinuation after the teaching period census: No refund applicable

This policy can be defined in a retention schedule as follows:

First entry: Date alias instance = 01-JAN-04, Retention% = 50.00, Retention Amount = no entry

Second entry: Date alias instance = 01-MAR-04, Retention% = 80.00, Retention Amount = no entry

Example 2

First entry: Date alias instance = 01-FEB-04, Retention% = no entry, Retention Amount = 50.00

Second entry: Date alias instance = 01-MAR-04, Retention% = no entry, Retention Amount = 75.00

Third entry: Date alias instance = 25-MAR-04, Retention% = 100, Retention Amount = no entry

With an effective assessment date of 15-FEB-04, the first entry applies. If an assessed fee liability is reduced at that time from \$120 to \$10, then the fee assessment is reduced to \$10, an additional debt of \$40 is retained, and the student is responsible for \$50 in total.

With an effective assessment date of 27-MAR-04, the third entry applies. If an assessed fee liability is reduced at that time from \$120 to \$90, then the fee assessment is entered as \$90, an additional debt of \$30 is retained, and the student is responsible for \$120 in total or 100% of the original assessment.

Prerequisites

Date aliases are set up.

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012): Click **Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendar Instances > Retention Schedule > Retention Schedules

Click **Back** to return to the Fee Type Calendar Instances window.

Additional Notes and Business Rules

Audit Fees: Retention schedules can be defined for system fee type **Audit Fees**.

Fee Category: Schedules for fees with a system fee trigger category of **Institution** must be specified for fee types.

Date Alias: Enter a date alias available in the fee period. A date alias can be used more than once, as long as a different instance is selected.

Retention%: Enter a proportion of a previous assessment. The assessed liability to which percentage retention applies can differ depending on the student's pattern of enrollment and withdrawal in units before the census date. In cases where a student progressively discontinues units, retention applies to the assessment immediately prior to the date of the first retention schedule entry. In cases where a student's enrollment fluctuates, retention applies on the highest assessment made whether immediately prior to, or during, the period when retention operates.

Retention Amount: Amounts not retained are available for refund.

Effective Dates: Start date is the date alias instance for the entry. Start date and end date for each entry indicates the inclusive period during which the entry applies. End date is the day before the start of the next entry. It can be the end date of the fee period.

23.13.1.5 Setting Up Element Ranges - Fee Type IGSFI020

Create element ranges for a fee type within which specific charge rates apply. After element ranges are set up, they allow a rate for a fee type to be charged if the student's load falls within the specified load range.

For fee types with a charge method of **EFTSU**, **Credit Point**, or **Charge Per Unit**, rates entered in the Fee Assessment Rates window can be assigned to element ranges entered in the Element Ranges window. For example, if the charge method is **Charge Per Unit**, a range of 9.000 to 12.000 can be set up, with a rate applied specifically to eligible students whose total calculated load for the relevant fee period falls within that range.

An important feature of the Element Ranges window is the ability to override the standard charge method for the fee by setting a **Flatrate** charge method for one or more ranges. In this case, all eligible students with a load falling within the range are charged the same amount for the fee.

You cannot access the Element Ranges window if the existing charge method for the fee is **Flatrate**.

Levels

For a particular fee, element ranges are specified for fee types if the ranges operate for the selected fee regardless of category, or for fee categories if the ranges apply only to the fee within the category selected. They cannot be specified at both levels for the same fee type. Fees with a trigger category of **Institution** can have element ranges entered only for fee types.

The window is accessed at the following levels:

- Fee types using the Element Ranges button in the Fee Type Calendar Instances window
- Fee categories using the **Fee Calculations** button and the Element Ranges button, or the **Fee Type Calendar Instance Elements Range** button in the Fee Category Fee Liability window

Note: The **Fee Type Calendar Instance Elements Range** button on the Fee Category Fee Liability window is displayed when ranges are already entered for fee types. The window can still be accessed for fee liabilities, but only to display the existing data.

Recording Range Rates

For each range specified in the Elements Range region, a rate or rates from those already entered in the Fee Assessment Rates window can be assigned to fee types. An element range rate record is created when a rate is assigned to an element range.

Example 1

You offer international students studying full-time a tuition fee of \$5,000 per semester. However, this arrangement applies only if students study three or four units per semester. If they drop below this load, or take more than four units, a fee of \$1,700 per unit is used.

To implement this in a one-semester fee period for **Tuition** fee type in the **International** category with a **Perunit** charge method, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$1,700 and Rate Number 2 for \$5,000.
- In the Element Ranges window, define three range entries.

Define the following range entries:

- Lower Range value = no entry; Upper Range value = 2; Rate Number 1

- Lower Range value = 3; Upper Range value = 4; **Flatrate Override Charge Method Type**; Rate Number 2
- Lower Range value = 5; Upper Range value = no entry; Rate Number 1

The fee assessment calculation is as follows:

- Student with a load of 1 unit: 1 times 1700 = \$1,700
- Student with a load of 2 units: 2 times 1700 = \$3,400
- Student with a load of 3 or 4 units: 1 times 5000 = \$5,000 that is the flat rate for this element range
- Student with a load of 5 units: 5 times 1700 = \$8,500

Example 2

A discount on a computer access fee is applied to students in computer science programs if their credit point load is over a certain value.

To implement a discount in a one-semester fee period for a **Comp-acc** fee type with a **Crpoint** charge method and triggered by computer science programs, perform the following tasks:

- In the Fee Assessment Rates window, set up Rate Number 1 for \$10 and Rate Number 2 for \$8.
- In the Element Ranges window, assign Rate Number 1 to a range with a Lower Range value of 1 and an Upper Range value of 9. Assign Rate Number 2 to a range with a Lower Range value of 10 and an Upper Range value of 12.

The fee assessment calculation is as follows:

- Student with a load of 3 credit points: 3 times 10 = \$30
- Student with a load of 4 credit points: 4 times 10 = \$40
- Student with a load of 9 credit points: 9 times 10 = \$90
- Student with a load of 10 credit points: 10 times 8 = \$80
- Student with a load of 11 credit points: 11 times 8 = \$88
- Student with a load of 12 credit points: 12 times 8 = \$96

Prerequisites

Assessment rates are set up.

Basic unit set details are set up.

Navigation

From previous procedure (Setting Up Fee Type Calendar Instances IGSFI012):
Click **Element Ranges**.

From Navigator: Student Finance > Setup > Fees > Fee Types > Fee Types > Fee Type Calendars > Fee Type Calendar Instances > Element Ranges > Element Ranges

Click **Back** to return to the Fee Type Calendar Instances window.

Click **Back** again to return to the Fee Types window.

Additional Notes and Business Rules

Audit Fees: Element ranges can be defined if the **Charge Method** is not **Flatrate**.

Include deleted ranges: If selected, then deleted ranges are included in the Element Ranges region of the Element Ranges window.

Lower Range: Enter the element range beginning. This sets the lower floor or value of the range that the rate specified applies.

Upper Range: Enter the element range end. This sets the higher or upper value of the ranges that the specified rate applies.

Override Charge Method Type: Enter the charge method type to be overridden. An important feature of this window is the ability to override the standard charge method for the fee type by setting a **FLATRATE** charge method for one or more ranges. In this case, all eligible students with a load falling within the range are charged the override flat amount.

Include deleted rates: If selected, then all rates, even those deleted in the Element Range Rate Region of the Element Ranges window, are displayed.

Rate Number: Enter the element range rate number. For each range specified in the Element Ranges region, a rate or rates from those already set up in the Define Fee Assessment Rates window can be assigned in the Element Range Rate region. An element range rate is created when a rate is assigned to an element range.

Creation Date: Enter the element range creation date. The system date is defaulted but a past or future date can be specified.

Deletion Date: Element range deletion date is automatically populated. It is assigned as system date at the time of deletion.

23.14 Setting Up Fee Category Calendar Instance IGSFI019

Fee Category Calendar Instance goes to fee category fee liability to one option the fee type calendar instance definition. This window displays the information set up at the fee type level of charge method, rule and rule description, and rule formula.

Fee categories group the fee that is applicable for a program attempt, and hence is attached to a program attempt when it is created. A program attempt has only one fee category. The Process Fee Assessments - Landscape and Process Fee Assessments from To Do Entries concurrent processes assess the fee included in this fee category.

You can allow changes in the fee category of a person program attempt even after the fee has been assessed for it. The fee category of a program attempt is derived based on the fee calendar instance for which the fee assessment is being done.

The attached fee category to all program attempts cannot be changed if prior assessment for a student is done. To perform a successful run in prior assessment mode, the fee category definition in the prior fee calendar instance and current calendar instance should be the same. Even the fee type attached to the fee category should be same and also have the same definitions.

Fee categories can be set up for international students and triggers can be driven from residency type. These fees can also be applied using the External Charges API or Ancillary Charges API. If the fee charge occurs once for international students only; then you can set up a **Flatrate** charge fee type with a system fee trigger category of **Institution**. This can be attached to a fee category used for international students.

RECOMMENDATION: At a minimum, you should establish the following set of fee categories:

- A postgraduate and an undergraduate fee category for international students, such as **Intrntl-Pg** and **Intrntl-Ug**
- A postgraduate and an undergraduate fee category for domestic students, such as **Domestic-Pg** and **Domestic-Ug**

Schedule data is typically associated with fee categories through schedule windows, accessed from the Fee Category Calendar Instance window. The schedules are intended to apply to all fees in a fee category and operate for fee categories.

Note: Overrides can apply for some fees in a fee category.

Fee Categories and Calendars

Like a fee type, a fee category must be associated with a fee period and assigned a set of dates. A fee category can only operate in the fee period and with the dates associated with it.

Create fee categories and link them to relevant calendar instances and date aliases. In the Fee Category Calendar Instance window, you can assign fee calendars to categories. You must enter appropriate active or planned fee calendar instances for each fee category, together with their relevant date alias instances. Date aliases are selected from instances already created in the Calendar subsystem.

If the assessment for a fee calendar instance is being done for the first time, the latest fee category attached to the program attempt is considered. If a previous assessment is present for this fee calendar instance, then the fee category to be used is the one used for the previous assessment. If there is a change in any of a person's program attempts, the prior assessment for that person is not possible.

Prerequisites

Fee periods are set up.

Date aliases are set up.

Account hierarchy is set up.

Calendar relationships are set up.

Navigation

Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance

Additional Notes and Business Rules

Perform the following procedures to complete fee category calendar instance setup:

1. Setting Up Retention Schedules - Fee Category IGSFI024
2. Setting Up Fee Category Fee Liabilities IGSFI019
 - a. Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
 - b. Setting Up Fee Triggers
 - Setting Up Program Group Fee Triggers IGSFI014
 - Setting Up Program Fee Trigger IGFSI015
 - Setting Up Program Type Fee Triggers IGSFI013

- Setting Up Unit Fee Trigger IGSFI016
 - Setting Up Fee Trigger Group IGSFI017
 - Setting Up Program Fee Trigger - Composite IGSFI015
 - Setting Up Unit Fee Trigger - Composite IGSFI016
 - Setting Up Unit Set Fee Trigger - Composite IGSFI018
 - Setting Up Unit Set Fee Trigger IGSFI018
 - Setting Up Fee Assessment Rates - Fee Category IGSFI021
 - Setting Up Element Ranges - Fee Category IGSFI020
3. Setting Up Fee Category Mapping IGSAD036
 4. Setting Up Unit Section Special Fees IGSPS132

Additional Notes and Business Rules

Currency: This field is disabled and defaulted with the functional currency set up in the System Options window. This field is updateable for customers who have created any fee category with any other than the local currency.

Status: Enter the status of fee category and calendar instance combination, as distinct from the status of calendar instance. A fee category and calendar instance status cannot be changed from **Active** to **Inactive** if a fee liability is **Active** in the category.

23.14.1 Setting Up Retention Schedules - Fee Category IGSFI024

Enter retention schedules for fee categories.

Prerequisites

Date aliases are set up.

Navigation

From previous procedure (Setting Up Fee Category Calendar Instances IGSFI019): Click **Fee Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance Window > Fee Retention Schedule > Retention Schedule

23.14.2 Setting Up Fee Category Fee Liabilities IGSFI019

Assign fees to fee categories. Fees can only be included in fee categories with the same fee period. After a fee is assigned to a fee category, it becomes a fee liability.

Calculation and schedule data can be set up for a fee liability. The data operates for fee liabilities and applies to the fee only when it is assigned to a specific fee category.

Although calculation data should be set up to operate for fee types and schedule data to operate for fee categories, setting up calculation and schedule data to operate for fee liabilities allows a single fee to be assessed for one category of student only.

Students can only be assessed a fee pertaining to their category regardless of calculation and schedule data setup.

Some fees are charged for a certain program, unit set, or unit. The windows to associate programs, unit sets, or units with fees are accessed through the Fee Category Calendar Instance window. If fees and fee triggers are not defined at the fee type level, they can be defined at the fee category level. The Fee Category Calendar Instance window allows you to attach fee categories to fee calendar instances or terms.

Prerequisites

Fee structure statuses are set up.

Date aliases are set up.

Navigation

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability

Click **Back**.

Steps

1. Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024
2. Setting Up Fee Triggers
 - a. Setting Up Program Group Fee Triggers IGSFI014
 - b. Setting Up Program Fee Trigger IGFSI015
 - c. Setting Up Program Type Fee Triggers IGSFI013

- d. Setting Up Unit Fee Trigger IGSFI016
- e. Setting Up Fee Trigger Group IGSFI017
- f. Setting Up Program Fee Trigger - Composite IGSFI015
- g. Setting Up Unit Fee Trigger - Composite IGSFI016
- h. Setting Up Unit Set Fee Trigger - Composite IGSFI018
- i. Setting Up Unit Set Fee Trigger IGSFI018
- j. Setting Up Fee Assessment Rates - Fee Type IGSFI021

Additional Notes and Business Rules

Changing attributes: Attributes of the fee category fee liability can be made **Inactive** or **Planned** if no longer in use. You cannot delete these attributes.

Audit Fees system fee type: If the fee category fee liability in context has the system fee trigger category of **Audit Fee**, then the **Fee Triggers** button on the Fee Category Fee Liability window opens only the Unit Fee Trigger window.

23.14.2.1 Setting Up Retention Schedule - Fee Category Fee Liability IGSFI024

This setup is required if you are defining retention schedules for fee liabilities.

Prerequisites

Date aliases are set up.

Navigation

From previous procedure (Setting Up Fee Category Fee Liability IGSFI019): Click **Fee Retention Schedule**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Retention Schedule > Retention Schedules (Fee Category Fee Liability Level)

Click **Back**.

23.14.2.2 Setting Up Fee Triggers

The setup for fee liability fee triggers varies depending on the fee trigger type set for the specified fee type for the fee category calendar instance.

If fee trigger type is Program, then the following three buttons are exposed:

- Program Group Fee Triggers (displays IGSFI014)
- Program Fee Triggers (displays IGSFI015)
- Program Type Fee Triggers (displays IGSFI013)

If fee trigger type is Unit, then the Unit Fee Trigger window opens.

If fee trigger type is Composite, then the following four buttons are exposed:

- Fee Trigger Groups (displays IGSFI017)
- Program Fee Triggers (displays IGSFI015)
- Unit Fee Triggers (displays IGSFI016)
- Unit Set Fee Triggers (displays IGSFI018)

If fee trigger type is **Unit Set**, then the Unit Set Fee Trigger window (IGSFI018) opens.

Create a new system fee trigger category of **Special Fees**. This is a dummy trigger with no trigger effect. Since this fee type is not available to be attached to a fee category calendar instance as a fee liability, no triggers are be defined.

The new system fee trigger category of **Special Fees** should only be attached to a fee type with the system fee type of **Special Fees**.

If the Fee Liability being processed by Fee Calculation has system fee trigger category of **Audit Fees**, then the triggers are matched as follows:

No Triggers Defined

For the Audit Fee Liability there are no units or unit sections defined as triggers.

In this case, the process verifies if the student has at least one student unit attempt which is enrolled as **Audit**.

If the student has at least one audited student unit attempt, then the trigger fires and the fee liability is applicable.

Note: For the tuition fee liability, if no triggers are defined, then the trigger is never fired. However, the behavior of the trigger for audit fee liability where no triggers are defined and the student has at least one audited student unit attempt is different. In this case as mentioned above the trigger does fire.

If the student does not have even a single audited student unit attempt, then the trigger does not fire and the fee liability is not applicable.

Triggers Are Defined

For the Audit Fee Liability there are units or unit sections defined as Triggers.

In this case, the process verifies one by one if any of the triggers defined matches with the student unit attempt. If there is a match found, then the process further verifies if the matched student unit attempt is **Audited**.

If there is a single student unit attempt which matches the trigger defined and is also enrolled as **Audit** by the student, then the trigger fires and the fee liability is applicable.

If no student unit attempt is found which matches the triggers defined and is also **Audited**, then the trigger does not fire and the fee liability is not applicable.

The setup for fee triggers is described in the following sections:

Program Fee Trigger Type

- Setting Up Program Fee Trigger IGFSI015
- Setting Up Program Type Fee Triggers IGFSI013
- Setting Up Program Group Fee Triggers IGFSI014

Unit Fee Trigger Type

- Setting Up Unit Fee Trigger IGFSI016

Composite Fee Trigger Type

- Setting Up Fee Trigger Group IGFSI017
- Setting Up Program Fee Trigger - Composite IGFSI015
- Setting Up Unit Fee Trigger - Composite IGFSI016
- Setting Up Unit Set Fee Trigger - Composite IGFSI018

Unit Set Fee Trigger Type

- Setting Up Unit Set Fee Trigger IGFSI018

23.14.2.2.1 Setting Up Program Fee Trigger IGFSI015 Include a program as a member of a trigger group and create a link between a fee liability and a program so that only students in the specified program are considered for the fee liability.

If triggers are entered in the Program Fee Trigger window, distinctions can be made between program versions, and within versions, at the program offering and offering option level. This is in contrast to broader groupings that are possible when triggers are entered in the Program Group Fee Trigger window and the Program Type Fee Trigger window at the program version level.

The Program Fee Trigger window is used to enter, maintain, or view programs and combination of criteria for programs that determine the scope of the fee liability selected.

This window is useful in setting up a small number of programs with fees particular to the program, or to a specific method of studying the program. Fees applying to a large number of programs can be set up within program groups or program types.

Changes in the application of fees to programs are accomplished by entering values in any of the optional fields. If location code, attendance mode, or attendance type have been selected, the fee assessment routine matches the values given to values held against the student's program attempt.

Program Attributes The programs that act as triggers are entered in the Program Fee Trigger region. Distinctions within programs are made depending on the values entered in optional fields.

Trigger Deletion Triggers are removed by deletion while still enabling transaction reversals to be made for those transactions that are already created as a result of the trigger.

For example, for program **A700**, version **2**, was established in 2004. With a postgraduate tuition fee trigger set only for this version, the fee could be restricted to students enrolling in the program in or after 2004.

For another example, a program for which a materials delivery fee is levied only for off-campus students studying through the **Kansas** campus can be represented in this window by entering an off-campus attendance mode and the **Kansas** location code, but leaving all other optional fields blank. The fee applies to all off-campus students studying through **Kansas**, both full-time and part-time. The fee also applies to program attempts of any program version and under any academic calendar.

The fields **Calendar Type**, **Alternate Code**, **Location**, and **Unit Class** are not updateable after the record is saved.

Prerequisites

Program codes are set up.

Navigation

From previous procedure (Setting Up fee Category fee Liability IGSFI019): Click **Program Fee Trigger**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Program Fee Triggers > Program Fee Trigger

Additional Notes and Business Rules

Fee Category: If the Fee Category field is blank, apportionment data operates for fee types, but with a category shown, the data operates for fee categories.

Include Deleted Triggers: If selected, then all triggers, including those that have been deleted are displayed in the Program Fee Triggers region of the Program Fee Trigger window.

Program Code: Only programs with a system program status of **Active** or **Planned** can be selected.

Version Number: Entering a version number sets the trigger at the program version level.

Trigger Group: The list of values presents all groups entered for the liability except those with a deletion date. For fee liabilities with a **Composite** trigger category, a recorded program can be included as a member of a trigger group by selecting a trigger group number. There is a limit of one program per trigger group. The same program can be used as a member of more than one trigger group for the same fee liability, if required.

Calendar Type: The calendar type sets the trigger at the program offering level. Open calendars with a system calendar category of **Academic** can be selected. After you have saved, this field is no longer updateable.

Location Code: The location code sets the trigger at the program offering level. After you have saved, this field is no longer updateable.

Attendance Mode: The attendance mode sets the trigger at the program offering level.

Attendance Type: The attendance type sets the trigger at the program offering level.

Creation Date: Only locations with a system location type of **Campus** are displayed.

23.14.2.2.2 Setting Up Program Type Fee Triggers IGSFI013 Create a link between a fee liability and the set of programs constituting a program type so that students in the specified programs can be considered for the fee liability.

The Program Type Fee Trigger window can be used to set a single trigger to operate for a particular grouping of a range of programs, as set up in the Program Structure and Planning subsystem.

This window shows the fee liability, which is the fee within a category in a fee period, in the Fee Category Fee Liability region and the charge method for which triggers are entered.

This window matches program types to fee liabilities, and is typically the window used most frequently in allocating fee triggers. The programs and versions that form a program type follow government classifications set up in the Program Types window in the Program Structure and Planning subsystem. Program types are assigned to program versions in the Program Ownership window.

Program Attributes The Program Type Fee Trigger window does not accommodate different attributes of the programs in question, but only the program versions established as a particular program type. If only some attributes of the programs are to invoke fee assessment, this must be handled by setting up rates only for those attributes in the Fee Assessment Rates window. For example, in that window there may be just one rate, which applies for an attendance type of full-time. Effectively, this prevents an assessment from being made against the selected fee type for student program attempts with any other attendance type.

Trigger Deletion Logical deletion is a way to remove a trigger from further use while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

Prerequisites

Program types are set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Program Type Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Program Type Fee Trigger > Program Type Fee Trigger

Additional Notes and Business Rules

Include Deleted Triggers: If selected, then all triggers, including those that have been deleted are displayed in the Program Fee Triggers region of the Program Fee Triggers window.

23.14.2.2.3 Setting Up Program Group Fee Triggers IGSFI014 Create a link between a fee liability and the set of programs constituting a program group so that only students in the specified programs are considered for the fee liability.

In the Process Fee Assessment concurrent process, triggers are used to decide if a fee applies to a particular program a student is studying. If a program trigger entered against a fee liability matches a student program attempt, the student is eligible for assessment.

The Program Group Fee Trigger window matches program groups to fee liabilities. Determine the programs and versions that form a program group are according to your institution's administrative or academic requirements.

RECOMMENDATION: Establish a specific program group type, for example **FEE-AS** to distinguish fee-related groups.

The Program Fee Trigger window is used to specify individual programs. The Program Group Fee Trigger window and the Program Type Fee Trigger window, which deals with program types, can be used to set a single trigger to operate for a particular grouping of a range of programs, as set up in the Program Structure and Planning subsystem.

The Program Group Fee Trigger window shows the fee liability, which is the fee within a category in a fee period, in the Fee Category Fee Liability region and the charge method for which triggers are entered.

Program Attributes The window does not accommodate different attributes of the programs in question, but only the program versions making up a group. If only particular attributes of the programs are to invoke fee assessment, this must be handled by setting up rates only for those attributes in the Fee Assessment Rates window. For example, in that window there may be just one rate, which applies for full-time attendance type. This prevents an assessment being made against the selected fee type for student program attempts with any other attendance type.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Program Group Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendars Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Program Group Fee Trigger > Program Group Fee Trigger

Close the window and return to the Fee Category Fee Liability window.

Additional Notes and Business Rules

Include Deleted Triggers: If selected, then all triggers, including those that have been deleted are displayed in the Program Group Fee Triggers region of the Program Group Fee Trigger window.

Note: This concludes the steps necessary to setup fee triggers with the fee trigger type of **Program**.

23.14.2.2.4 Setting Up Unit Fee Trigger IGSFI016 Include one or more units as part of a fee trigger group and create a link between a fee liability and unit so that only students in the specified units are considered for the fee liability.

In the Process Fee Assessment concurrent process, unit fee triggers match unit-related fees to corresponding student unit attempts. If a unit trigger entered against a fee liability matches a student unit attempt, the student is eligible for assessment for the fee.

Unit triggers are assigned to fees with either a **Unit** or a **Composite** trigger category. With the **Unit** category, the trigger is used for fees relating very specifically to individual units, or a small number of units.

A unit trigger can be set up to take effect only if it matches one or more attributes. These include a particular teaching calendar, a specified instance of the selected teaching calendar, the location where the unit is studied, and the class in which the unit is undertaken.

The following is not updateable information after you save:

- Calendar Type
- Alternate Code
- Location
- Unit Class

Trigger Deletion Logical deletion is a way to remove triggers while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

Prerequisites

Unit codes are set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Unit Fee Trigger

Note: This concludes the steps necessary to setup fee triggers with the fee trigger type of **Unit**.

Additional Notes and Business Rules

Fee Category: If this field is blank, then apportionment data operates for fee types. With a category shown, the data operates for fee categories.

Include Deleted Triggers: If selected, then all triggers, including those that have been deleted are displayed in the Unit Fee Triggers Region of the Unit Fee Trigger window.

Unit Code: Only units with a system unit status of **Active** or **Planned** can be selected.

Version Number: Version number sets the trigger at the unit version level.

Trigger Group: For fee liabilities with a **Composite** trigger category, enter a unit in a trigger group by selecting a trigger group number. If desired, the same unit can be entered more than once if included in a different trigger group.

Calendar Type: Calendar type sets the trigger at the unit offering level.

Alternate Code: The alternate code sets the trigger at the program offering level.

Location: The location sets the trigger at the unit offering option level.

Unit Class: The unit class sets the trigger at the unit offering option level.

23.14.2.2.5 Setting Up Fee Trigger Group IGSFI017 Create a group of triggers linked to a fee liability. Only students with enrollments that match all the member triggers of the group are considered for the fee liability.

Trigger groups are created so that a set of programs, unit set, and unit triggers are collectively used as a single trigger for a fee liability. For the collective trigger to be

effective, all the member triggers of the trigger group must match the student's enrollment details. If this occurs, the student is eligible for assessment of the fee.

Trigger groups can be used only for fees with the trigger category type **Composite**. Members can be a combination of programs, unit sets, and unit triggers. Only one program trigger can be included per trigger group. Program type triggers and program group triggers cannot be included in a trigger group.

The following are valid trigger groups:

- Trigger group 1: program, one or more unit sets, and one or more units
- Trigger group 2: program and units
- Trigger group 3: unit set or sets and a unit or units

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Fee Trigger Groups.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Fee Trigger Groups > Fee Trigger Group

Additional Notes and Business Rules

Include Deleted Groups: If selected, then all groups including those that have been logically deleted are displayed in the Fee Trigger Groups region of the Fee Trigger Group window.

Trigger Group: Trigger group number is supplied automatically when the record is saved.

23.14.2.2.6 Setting Up Program Fee Trigger - Composite IGSFI015 When used for a fee liability with a **Composite** category, a recorded program can be included as part of a trigger group. Trigger groups are established in the Fee Trigger Group window.

Prerequisites

Program codes are set up.

If program is to be grouped with unit or unit set, fee trigger groups must be set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Program Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Program Fee Triggers > Program Fee Trigger (Composite)

23.14.2.2.7 Setting Up Unit Fee Trigger - Composite IGSFI016 When the category is **Composite**, the window can be used to include units as part of a trigger group established in the Fee Trigger Group window.

Prerequisites

Unit codes are set up.

If program is to be grouped with program or unit set, fee trigger groups must be set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Unit Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Unit Fee Triggers > Unit Fee Trigger (Composite)

23.14.2.2.8 Setting Up Unit Set Fee Trigger - Composite IGSFI018 When the Unit Set Fee Trigger window is used with a **Composite** category, unit sets can be included as part of a trigger group, which is established in the Fee Trigger Group window. For example, a particular stream for a program can be associated with a fee liability.

Prerequisites

Unit sets are set up.

If program is to be grouped with program and or unit, fee trigger groups must be set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click Unit Set Fee Triggers.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Unit Set Fee Triggers > Unit Set Fee Trigger (Composite)

Note: This concludes the steps necessary to setup fee triggers with the fee trigger type of **Composite**.

Deletion of Triggers Logical deletion is a way to remove a trigger from further use while still enabling transaction reversals to be made for those transactions that have already been created as a result of the trigger.

For example, there may be some programs that attract a fee for laboratory use. Program versions for these programs could be entered against a program group, **LAB-CRS**, and this group assigned as a trigger to a liability with the fee type **LAB-FEE**.

Prerequisites

Program groups are set up.

23.14.2.2.9 Setting Up Unit Set Fee Trigger IGSFI018 The unit set fee triggers procedure enables users to include one or more unit sets as part of a fee trigger group and create a link between a fee liability and unit set. By creating a link, only students in the specified unit sets are considered for the fee liability.

Unit set fee triggers enable the Process Fee Assessment concurrent process to match fees related to unit sets to corresponding student unit set attempts. If a unit set trigger entered against a fee liability matches a student unit set attempt, the student is eligible for assessment of the fee.

Unit set triggers can be assigned to fees with either trigger category type **Unit Set** or **Composite**. An example of using a trigger with type **Unit Set** is to charge a fee only to students undertaking a certain major sequence.

Prerequisites

Unit sets are set up.

Navigation

From previous procedure: (Setting Up Fee Category Fee Liability): Click **Unit Set Fee Trigger**.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Triggers > Unit Set Fee Trigger

Note: This concludes the steps necessary to setup Fee Triggers with the fee trigger type of **Unit Set**.

Additional Notes and Business Rules

Include Deleted Triggers: If selected, then all triggers, including those that have been deleted are displayed in the Unit Set Fee Triggers Region of the Unit Set Triggers window.

Unit Set Code: Only unit sets with a system unit status of **Active** or **Planned** can be selected.

23.14.2.3 Setting Up Fee Assessment Rates - Fee Category IGSFI021

If the rates have been defined at the fee type calendar instance level then the Fee Assessment Rates window can still be accessed from the fee category fee level, but only to view existing fee type calendar instance rates.

Create and maintain a fee assessment rate or set of rates that apply to fee categories. Rates shown in this window are used by the Process Fee Assessment and Process Fee Assessment From To Do Entries concurrent processes.

Prerequisites

Fee periods are set up.

Fee types are set up.

Location codes are set up.

Attendance types are set up.

Attendance modes are set up.

Class standing is set up.

Programs are set up.

Organizations are set up.

Residency statuses are set up.

Navigation

From the previous procedure (Setting Up fee Category Fee Liability): Click Fee Calculations. > Click Fee Type Calendar Assessment Rate.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Calculations > Fee Type Calendar Assessment Instance Rate > Fee Assessments rates

Click **Back**.

Click **back arrow** (up arrow).

23.14.2.4 Setting Up Element Ranges - Fee Category IGSFI020

Element ranges are specified at the fee type calendar instance level if the ranges operate for the selected fee regardless of fee category, or at the fee category calendar instance level if the ranges apply only to the fee within the category selected. They cannot be specified at both levels for the same fee type.

The **FTCI Elements Range** button is displayed when the ranges are already entered at the fee type calendar instance level. The window can still be accessed from the fee category fee instance level, but only to view the existing data.

Element ranges setup is not available for fee trigger type **Institution**.

Prerequisites

Assessment rates are set up.

Navigation

From the previous procedure (Setting Up Fee category Fee Liability): Click Fee Calculations. Click Element Ranges.

From Navigator: Student Finance > Setup > Fees > Fee Category Calendar Instance > Fee Category Calendar Instance > Fee Liabilities > Fee Category Fee Liability > Fee Calculations > Elements Range > Element Ranges

Click **Back** to return to the fee category Fee Liability window.

Close the window to return to the Fee Category Calendar Instance window.

23.14.3 Setting Up Fee Category Mapping IGSAD036

Set up fee category mapping.

See Chapter 14, "Admissions" for more information.

23.14.4 Setting Up Unit Section Special Fees IGSPS132

Set up unit section special fees.

See Chapter 12, "Program Structure and Planning" for more information.

23.15 Credit Types

Set up credit types.

23.15.1 Setting Up Credit Type IGSFI050

Define a credit type and associate attributes and accounts to it. Credit types provide debit and credit accounts for the credit transaction and determines if a credit transaction is allowed for refund. In addition, the credit type can be identified as **Title IV** funds for US Financial Aid purposes.

Map credit types to credit classes. The credit type debit and credit account are defaulted from the System Options window Oracle General Ledger Accounts Tab setup but can be revised on the Credit Type window if required.

Prerequisites

System options are set up.

If you are using Oracle Financials, Oracle General Ledger is set up.

If you are a using Non-Oracle Financials system, fee posting accounts are set up.

Navigation

Student Finance > Setup > System > Credit Type

Additional Notes and Business Rules

Negative Charge Adjustment: Credits with the credit class of **Negative Charge Adjustment** can be applied only to the charge that is the source of the negative adjustment. In other words, application hierarchy does not apply credit to the credit types that have the credit class of **Negative Charge Adjustment**.

Credit Class: System credit classes are **Negative Charge Adjustment, Enrollment Deposit, External Financial Aid, Internal Financial Aid, Online Payment, Other Deposit, Payment, and Sponsorship**.

Refund Allowed check box: The Process Refunds for Excess Credits concurrent process considers the value of this check box when processing the refund for a credit having the credit type. For example, if the **Refund Allowed** check box is deselected for a credit type, then the concurrent process does not process the refund for a credit with this credit type.

Title IV: If selected, then credit in the student account of this type is identified as Title IV credit and is used by the application process. Title IV is Federal Title IV funds (Federal Pell, Perkins, SEOG, and all loan funds).

23.16 Application Rules

Define rules for applying credits and payments to the various charges on the student's account.

You can apply, unapply, and reapply a credit transaction to charges after an application hierarchy has been defined for a credit type. You are provided with a list of debit items that are open and the balance amount that is due after the application hierarchy has been defined for a credit type. You can either allow Oracle Student System to apply the amount through a targeted application or define amounts for all the debit items through the Mass Application Process concurrent process.

Account definitions include unit accounts, unit section accounts, location accounts, fee type accounts, program accounts, organization accounts, and credit type accounts.

Application Hierarchies

How the application process handles prior semesters charges depends upon the setting of the site level profile IGS: Use Funds Authorization, whether the student has signed the Funds Authorization and the check box is checked denoting receipt or signature, whether there are any credit types with the **Title IV** check box selected, and the nature of the fee types in the prior period.

Funds Authorization Profile Set to N or Title IV Check Box Deselected

If the Funds Authorization Profile is set to **N** or there are no Title IV credit types identified, the application process will access the hierarchy rules (fee types) setup under the Allowable tab of the application hierarchy in order. For each of the fee types listed in the hierarchy, the due charges are obtained without considering the fee period. The charges are ordered by charge creation date in ascending order. In other words, application occurs by allowable fee types and within each fee type by prior and then current fee periods.

Funds Authorization Profile Set to Y, Title IV Check Box Selected, and Funds Authorization Check Box Selected

If the Funds Authorization Profile is set to **Y**, **Title IV** check box is selected denoting Title IV funds, and the Funds Authorization for the student is selected denoting signature of the funds authorization, the appropriate applications hierarchy is

accessed and the fee types defined in the Allowable tab in the hierarchy setup are obtained.

For each of the fee types selected in that order, the due charge records for the fee period in context are obtained. After this is accomplished, the fee types defined in the Additional Authorized tab in the application hierarchy setup and the due charges records for the fee period in the context credit record are obtained. If there remains any unapplied amounts, the fee types defined in the Allowable tab of the hierarchy setup that are not in the fee period of the credit record, and then the **Additional Authorized** fee types are obtained. Due amounts are ordered by charge creation date in ascending order within a fee type.

Funds Authorization Profile Set to Y, Title IV Set to Y and Funds Authorization Check box Deselected

If the Funds Authorization profile is set to **Y** and **Title IV Credit** check box is selected denoting Title IV funds, and the Funds Authorization was not signed by the student, the fee types defined in the Allowable tab for the current fee period only are selected and the due charge records are obtained.

23.16.1 Setting Up Application Hierarchies IGSFI053

Create an application hierarchy to define the hierarchy or order of fee types that a credit or payment should be associated with to reduce the balance due amount of charges for a student.

Prerequisites

Fee types are set up.

Credit types are set up.

Navigation

Student Finance > Setup > System > Application Hierarchies

Additional Notes and Business Rules

System fee types: You can include fee types mapped to system fee types of **Audit Fees** and **Special Fees** in the application hierarchy.

Effective Dates: **Start Date** field is required and **End Date** field is optional.

Credit Type: All credit types of the credit class except **Enrollment Deposit** and **Other Deposit** are valid.

Sequence: Identify the order in which the credit type is applied to the fee types defined.

Enable: If selected, then the Mass Application process considers the fee type has been defined.

23.17 Balance Rules

Balance rules are used to determine the fee types and credit types that are to be excluded from the fee and holds balance calculation.

The balance calculations are used by the following concurrent processes for finance and late charges and holds:

- Process Application of Finance Holds
- Process Release of Finance Holds
- Finance and Late Charges

23.17.1 Setting Up Balance Rules IGSFI044

Define exclusions of fee types and credit types for the system balance types of **Fee** and **Hold**. You must set up an initial holds balance rule as well.

An initial holds balance rule is required to be set up.

Prerequisites

Fee types are set up.

Credit types are set up.

Navigation

Student Finance > Setup > System > Balance Rules

Additional Notes and Business Rules

Deletion: Records in this window cannot be deleted.

Revising balance rules: If you revise a balance rule, you must run the Holds Balance Conversion Process. See *Oracle Student System User Guide* for more information about this concurrent process.

23.18 Hold Plans

You can place a financial hold on a student's account based on the student's past due balance or balance outstanding of specific fee types.

Defining holds includes setting up and establishing rules for placing holds on a student account for fee types and account balance.

Holds plans are composed of:

Holds threshold amount: If the balance is past due, or the individual fee type balance of the holds plan for the student or fee type is greater than the holds threshold amount, a hold is placed against the student. If the total outstanding balance on the process end date is greater than the threshold amount defined at the hold plan, holds are applied.

Holds threshold percentage: If the balance is past due, or the individual fee type balance of the holds plan for the student or fee type is greater than the holds threshold percentage of the total balance at the respective level, a hold is placed against the student. If ratio of the total outstanding balance on the process end date and outstanding charges on the process start date is greater than the threshold percentage defined at the hold plan, holds are applied.

Hold types: User-defined hold types are mapped to one or more system hold effects type. The system hold effects types prevent students from receiving certain administrative services at your institution.

23.18.1 Setting Up Hold Plans IGSFI068

Set up and establish rules for placing holds on a student account at either the student account balance level or the fee type balances level.

If you define a hold plan for balances, the Holds Application concurrent process reviews if the account balance to ensure that a student has paid a sufficient amount. If you define a hold plan for fee types, the holds application process considers the fee type balances.

Prerequisites

Fee types are set up.

Hold types are set up.

Navigation

Student Finance > Setup > Holds Plans

Additional Notes and Business Rules

Offset Days: Days optionally defined used by the concurrent process to calculate the determination date for any overdue balance.

Required values: Enter either the default amount or the default percent. One of these two values is required.

Default Amount: Enter the default tolerance threshold amount. If this field is entered, the Default Percent field is locked and cannot be entered. If the student balance is below this amount, then the student is placed on hold. This is the default amount for all students. If threshold amount is provided here, but no threshold is defined specifically for payment plans, then this default threshold will be the amount used.

Default Percent: Enter the default tolerance threshold as percent of balance. If the student outstanding balance is below this percentage of their total balance, then no hold is placed. This is the default percent for all students. If threshold percent is provided here, but no threshold is defined specifically for payment plans, then this default threshold is the amount used.

Payment Plan Amount: Enter the default tolerance threshold specifically for payment plan balances. This threshold amount is used to evaluate students based on payment plans. If the student is on an **Active** payment plan, and this field is defined, then Oracle Student System uses this threshold amount instead of any default threshold information to determine if the student is placed on hold. If this field is not defined, and the default threshold information is defined, then Oracle Student System uses the default threshold to determine if the student is placed on hold.

Payment Plan Percent: Enter the default tolerance threshold specifically for payment plan balances. This threshold percent is used to evaluate students based on payment plans. If the student is on an **Active** payment plan, and this field is defined, then Oracle Student System uses this threshold percent instead of default threshold information to determine if the student is placed on hold. If this field is not defined, and the default threshold information is defined, then Oracle Student System uses the default threshold information to determine if the student is placed on hold.

Special Fees system fee type: Fee types with a system fee type of **Special Fees** can be included in the fee type level hold plan definition.

Audit Fees system fee type: Fee types with a system fee type of **Audit Fees** can be included in the fee type level hold plan definition.

23.19 Finance and Late Charges

Set up finance and late charges.

23.19.1 Setting Up Finance and Late Charges IGSFI067

After charges are created on the student account, students are responsible for paying the charges within a specific period of time. If these charges are not paid, you can assess and apply a late fee or finance charge.

You can create various late fee or finance charge plans. The plans created are used as parameters to calculate the late fee or finance charge. There is no restriction on the number of finance charge or late fee plans that can be created for a plan type.

You can apply these finance and late charge plans to all students whether the student is on a payment plan or not. If you want to apply a different set of thresholds to students on a payment plan, you can set up threshold amounts specific to payment plans.

When you define a finance charge plan type, you should consider defining a different average daily balance definition than used for the regular account balance. If you use the same definition for both, there can be a large difference in the average daily balance for payment plans.

Fees are calculated by running the Calculate Late Fee and Finance Charge concurrent process. Students that are on an active payment plan are evaluated based on the amount outstanding for a specific installment. When setting up the Finance and Late Charge plans, you should consider whether different plan definitions are warranted.

Prerequisites

Fee types mapped to system fee types of **Finance** and **Late Fee** are set up.

Navigation

Student Finance > Setup > Finance and Late Charge Plan

Additional Notes and Business Rules

Fields: Fields are identical for both Default and Payment Plan tabs except that the **Accrual Type** field is not required in the Payment Plans tab.

Default values: If you define the default settings without defining any payment plan specific settings, then the default values are used for all students, including those under a payment plan.

Payment plan students: If the settings for payment plans are defined, then those settings apply only to students in a payment plan. The default applies to students not in a payment plan.

Offset Days: Offset days are added to the balance due date to arrive at the date when the particular fee is due.

Charge Rate: This field is enabled when the plan type is **Late** and accrual type is **Flatrate**. This field is also enabled when the plan type is **Finance** and the accrual type is **Average Daily Balance Past Cutoff Date** or **Average Daily Balance Past Due Date**.

Flat Amount: The field is enabled when the plan type is **Late** and accrual type is **Flat Amount**.

Min Balance Amount: The field is enabled when plan type is **Late**.

Min Charge Amount: The field is disabled when accrual type is **Flat Amount**.

Max Charge Amount: The field is disabled when accrual type is **Flat Amount**

Min Charge Amount No Charge: The field is disabled when accrual type is **Flat Amount**

23.20 Refund Tolerance Limits

Refund tolerance limits allow you to set up a range of amounts within which refunds will be processed automatically. If the refund process returns an amount less than the lower limit or more than the upper limit, the refund process will not create a refund transaction. For these students, a manual refund is required.

Set up refund tolerance limits to support refund functionality.

23.20.1 Setting Up Refund Tolerance Limits IGSFI065

Set up an upper limit and a lower limit for a period. If the refund amount is higher or lower than the tolerance limit, then the refund is not automatically processed when the Process Refunds for Excess Credits concurrent process is run and must be refunded manually.

Navigation

Student Finance > Setup > Refund Tolerance Limits > Refund Tolerance Limits

Additional Notes and Business Rules

Dates: The refund tolerance limit period identified by the start date and end date must not overlap.

23.21 Sponsorships

Sponsors can pay for all or a portion of a student's tuition and fees for specific terms. Sponsorships functionality allows you to enter details of the sponsorships and assign a student to a sponsor.

You can assign students to a sponsor and enter details of which fee classes and the percentage of fees the sponsor pays.

Sponsorships functionality includes the following concurrent processes:

- **Base Record - Create Financial Aid Base Record Process:** This concurrent process collects person information from Oracle Student System and creates corresponding records in Financial Aid. This concurrent process is a prerequisite for assigning students to sponsor and also for Sponsorship Awards Process and Rollover Sponsorship Awards Process concurrent processes.
- **Awards - Rollover Sponsorship Attributes Process:** This concurrent process carries forward the details of sponsor setup or sponsor and student relationships following award year. You can specify which details are to be rolled over.
- **Awards - Assign Sponsorship Awards Process:** This concurrent process creates awards and disbursements for a fund. When the concurrent process is run with the award type parameter, it checks for eligibility criteria and validations before awarding the sponsor amount to the students. Awarding money to the students can be performed manually through the Student Awards window, Awards -Disbursements -Transfer to Student Account concurrent process, and Sponsor Award concurrent process.

23.21.1 Setting Up Sponsorship

To assign a party number and enter the sponsor in the Person Details window, you must map a person type of **Sponsor** to the system person type of **Organization** or **Institution**.

You can also enter a sponsor in the Organizational Structure Setup window to automatically assign a party number.

Setup

Sponsorship functionality uses data in setup windows maintained in Student Finance. The following windows are required to support Sponsorship functionality:

- Fund Type
- Fund Code
- System Award Year Mappings
- Fund Calendar Relations

23.22 Accounting Period Statuses

The creation of the transactions in the Student Finance subledger and subsequent posting to the general ledger is controlled by the statuses of the subledger accounting period.

You maintain the accounting period statuses in Student Finance through the setup of the Accounting Period Statuses window.

The relevant accounting periods are the periods defined for the Set of Books defined in the System Options window.

Setting up accounting period statuses is required if you are using Oracle Financials.

23.22.1 Setting Up Open/Close Accounting Periods IGSFI071

Maintain the accounting period statuses in Student Finance when using Oracle General Ledger. You cannot create or delete any new accounting periods in this window. New accounting periods are created within the Accounting Calendar in Oracle General Ledger and appear in Oracle Student System with the status of **Not Opened**. You can change this status.

Statuses include:

Not Opened: This period has never been opened. Any new period created in a calendar defaults to this status in the Student Finance subledger. You cannot create any transaction in this period and no transactions are allowed to post to Oracle General Ledger in this period. The only change allowed from **Not Opened** is to **Open** or **Future**.

Future: This period is not yet open. You can create transactions in this period, but you cannot post to Oracle General Ledger. The only change allowed from **Future** is to **Open**.

Open: This period is open. Transaction entry and posting to Oracle General Ledger are allowed in this period. The only change allowed from **Open** is to **Close Pending** or **Closed**.

Closed: This period is closed. Transaction entry and posting to Oracle General Ledger are not allowed in this period. Before you close a period, you must verify that there are no unposted items in the period. You must post all transactions from Student Finance to the GL_INTERFACE table before the period can be closed. The only change allowed from **Closed** is to **Close Pending** or **Open**.

Close Pending: Transaction entry and posting to Oracle General Ledger are not allowed in this period. There is no validation for unposted items. You can change the status from **Open** to **Close Pending** without posting all of the transactions to the GL_INTERFACE table. The only change allowed from **Close Pending** is to **Open** or **Closed**.

Changing Period Statuses

There are validations when you try to change the status of a period from **Open** or **Close Pending** to **Closed**.

In Accrual Basis accounting, Oracle Student System checks for unposted transaction in the Charges Line table, Credit Activities table, and Applications table.

In Cash Basis accounting, Oracle Student System checks for unposted transactions in the Credit Activities table and Applications table.

Transactions are considered unposted if they do not have a value for posting ID and posting control ID.

When you change the period status from **Not Opened** to **Future**, Oracle Student System check the future periods set up in the Set of Books attached to the System Options window. In the Set of Books, you can specify how many periods are allowed to have the status of **Future**.

Prerequisites

Oracle Financials is set to **Yes** in the System Options window.

Navigation

Student Finance > Setup > Accounting > Open / Close Periods

Additional Notes and Business Rules

Latest Open Period: If there is no period with an **Open** status, the field is blank.

Open Next Period: When this button is clicked, the status of the period is changed from **Not Opened** to **Open**.

Number: Enter the period number within the fiscal year. Value is PERIOD_NUM from the Accounting Calendar Oracle General Ledger table.

Fiscal Year: Enter the fiscal year of the period. Value is the PERIOD_YEAR from the Accounting Calendar Oracle General Ledger table.

Name: Value is the PERIOD_NAME from the Accounting Calendar Oracle General Ledger table.

Start Date: Value is the START_DATE from the Accounting Calendar Oracle General Ledger table.

End Date: Value is the END_DATE from the Accounting Calendar Oracle General Ledger table.

23.23 Lockboxes

Set up lockboxes.

23.23.1 Setting Up Lockboxes IGSFI073

Set up and assign default attributes for individual lockboxes. The Lockbox functionality includes an interface and import process that allows you to record payments and deposits in the student account using the bank generated data file as the source. If the bank is able to provide sufficient detail concerning the payment in the data file, then the Lockbox Import concurrent process can perform targeted application of the credit to charges.

The ability to support multiple credit types in a single payment, or multiple credit types in a single lockbox account, is constrained by the ability of the bank to provide them in the lockbox transmission file. The bank will typically provide this information in the form of a bank code, which in turn must be mapped to a credit type during lockbox setup.

You must enter a party number in the bank lockbox transmission file for every record to identify the student or sponsor account to be credited.

Enrollment Deposits

If you want to receive enrollment deposits through lockboxes, you must provide a valid application number with the status of **Accepted**, **Deferred**, and **Confirmed**.

The bank must report this deposit as a separate receipt, not as a designated application.

Lockbox Setup

Setting up Lockboxes involve the following steps:

- Define lockboxes
- Optionally the lockboxes may be associated with a bank. The bank name is derived from Oracle Payables if banks have been setup there, or manually input if Oracle Financials is not being used.
- Setup default credit types. A default credit type may be setup to handle situations in which the bank transmission file has not provided a bank code for mapping.
- Optionally map the bank codes in the bank transmission file data values to data values in student finance
- Optionally map additional bank transmission data, such as fee calendar instances.

Prerequisites

Credit types are set up.

The Control File and the SQL/Loader process must be configured and registered as a concurrent process before the lockbox setup is complete.

You must register a concurrent process that invokes a SQL/Loader program that uses the control file.

You must register a concurrent program and a control file for each lockbox that has a different data file.

Navigation

Student Finance > Setup > System > Lockbox

Additional Notes and Business Rules

Currency: Multi-currency lockbox receipts are not supported. All receipts are assigned the default functional currency.

Lockbox Name: This name must be identical to the value that the bank includes in the lockbox data transmission file because the process will validate the bank data against the value entered in this field.

GL Date Source: Define how the process derives the Oracle General Ledger date for lockbox receipts.

- **Import Date GL:** Date should default from the system date when the lockbox import process is run. Each receipt in that lockbox batch all have the same Oracle General Ledger date.
- **Bank Data File:** The bank file provides a date for each record that should be used as the Oracle General Ledger date. In this case, the records in this lockbox receipt batch can have different Oracle General Ledger dates.
- **User Supplied:** You supply a default date in the Lockbox Import concurrent process that is used for all of the Oracle General Ledger dates for the imported batch.

Default Credit Type: Enter the credit type that is automatically assigned to any lockbox records that is missing a bank code identifying the purpose of the payment. This credit type is only for transactions that are missing a code. This field is required if no credit type codes have been mapped.

Name: The bank name is only available for input only if Oracle General Ledger is set to **Yes** in the System Options window and a bank entity has been set up in Oracle Payables. This list of values derived from valid Oracle Payables Bank entities.

Bank Account Number: The bank account number is only available for input only if Oracle General Ledger is set to **Yes** in the System Options window and if a bank account entity has been set up in Oracle Payables. This list of values is selected from valid Oracle Payables Bank Account entities.

Bank Code: Enter an identifier for payment supplied by a bank. You must enter all possible bank supplied code values. You must ensure that the data you enter matches exactly the expected values in the transmission file. These values should be mapped to credit types. Each value must be unique. One bank code value cannot be assigned to two credit types, nor can two bank codes be assigned to one credit type. At least one mapping record must be entered if no default credit type has been assigned and saved.

Credit Type: Enter credit types mapped to the identifiers supplied by a bank. You must ensure that the data you enter matches exactly the expected values in the transmission file. You can select only **Active** credit types with either no end date or end date later than the lockbox setup date. If the lockbox contains payments with different credit types, you must map every possible code provided by the bank to the existing credit types.

Fee Calendar Instance: Enter a unique value. One bank code cannot be mapped to two fee calendar instances, nor can two bank codes be mapped to one single fee calendar instance. The mapping relationship must be one-to-one.

Transmission File Identifiers: Enter a unique code that identifies the record type in the bank transmission file. One identifier cannot be mapped to two record types.

CAUTION: If you do not set up a default credit type, and the bank does not provide a bank code in its transmission file, then Oracle Student System will not import the record.

23.23.1.1 Control File

The control file controls the Lockbox Loader concurrent process. It contains positional data for mapping data columns in the bank lockbox transmission file to columns in the lockbox interface table. This text file resides in the appltop/bin directory.

CAUTION: The control file is a template supplied and seeded with Oracle Student System. The template provides sample data. You must replace this template with a version customized to your own bank lockbox data requirements.

You can define one control file for each lockbox you intend to use. If you have two lockboxes with identical transmission file formats, you can use the same control file for both. The control file will be associated with the lockbox during the Lockbox Loader process.

The data fields to be mapped in this control file are the fields required for the Lockbox Interface table.

Sample Control File

For implementing this functionality, you must create customized SQL* Loader concurrent processes (for the lockboxes setup) that use control files to parse the bank provided data flat file based on data positioning. These SQL* Loader concurrent processes are used to upload the data from the bank supplied flat file to the appropriate columns in the lockbox interface table IGS_FI_LOCKBOX_INTS.

23.23.2 Type I and Type II Validations

The Import Lockbox Process concurrent process reads the interface table and converts the data to credits for the students. This concurrent process performs two types of validations.

Type I validations verify that the bank lockbox transmission data is valid and corresponds to the transmission format that you set up. Errors from Type I validations must be rectified by bank re-transmission or verification of the data file itself.

Type II validations verify that the data conforms to the internal requirements of Student Finance. Type II validation errors need to be corrected using the Lockbox Error Resolution window and running the Error Resolution process.

23.23.2.1 Type I Validations

Oracle Student System validates bank transmissions. Unless specified as required, these validations operate only when data is provided in the relevant field.

Transmission Level Validation

Transmission level validations include:

- Transmission record count is correct
- Transmission amount (sum of all receipts in the entire transmission file) is correct

Lockbox Validation

Lockbox validations include:

- Lockbox batch count is correct
- Lockbox amount is correct
- Lockbox record count is correct

Batch Validation

Batch validations include:

- Batch name is unique within the lockbox
- Batch amount is correct
- Batch record count is correct

Receipt Validation

Receipt validations include:

- Receipt amount is specified

- The sum of the amounts of the Designated payments specified in the overflow region of the receipt record do not exceed the receipt amount
- Unique item number is specified within a batch, a lockbox, or the transmission, depending on the transmission format
- Party number is specified
- Receipt belongs to a batch that is also included in lockbox transmission
- Receipt has a source to derive both lockbox and batch level information

Overflow Validation

Overflow validation includes:

- Batch name is specified
- Lockbox number is specified
- Item number is specified and matches a receipt record
- Sum of all of the overflow records for that receipt does not exceed the receipt total amount

23.23.2.2 Type II Validations

Oracle Student System validates bank transmissions. Unless specified as required, these validations operate only when data is provided in the relevant field.

Lockbox Validation

Lockbox validations include:

- Lockbox batch count is correct
- Lockbox amount is correct
- Lockbox record count is correct

Batch Validation

Batch validations include:

- Batch name is unique within the lockbox
- Batch amount is correct
- Batch record count is correct

Credit Type Validation

Credit type validation includes:

- Default credit type is assigned\
- Credit type is valid
- Credit type is mapped

Party Number Validation

Party number validation includes:

- Party number exists and is valid
- Party number must either be type **Person** or **Student**

Admission Application Number Validation

Admission application number validation includes:

- Admission application number exists and is valid

Overflow Validation

Overflow validation includes:

- Enrollment and Other do not have any overflow records

Date Validation

Oracle General Ledger date validation includes:

- Oracle General Ledger date parameter exists
- Oracle General Ledger date is valid

23.24 Setting Up Payment Plan Template IGSFI075

Create and store master payment plan templates. Payment plans are a way of helping the student pay for the cost of attendance. It is a budgeting tool which allows students to distribute cost in predetermined amounts over a period of time. Payment plan templates are a master plan that can be modified when assigned to a specific student.

An installment of a payment plan operates as an individual due amount and is due on the same date of the month, on a monthly basis, for all payment plans defined by the same template.

You cannot set up payment plan templates if the value for the **Manage Accounts** field in the System Options window is set to **Null** or **Other**.

Prerequisites

Fee types defined for the system fee type of **Payment Plan**.

Navigation

Student Finance > Setup > Payment Plan > Payment Plan Templates

Additional Notes and Business Rules

RECOMMENDATION: There is no validation on the user-defined **Installment Number** field. You should enter this value in numerical sequence without skipping numbers when modifying, changing, deleting, or adding installments.

Altering previously defined templates: If a previously created template is altered, then all future students who are assigned this newly revised template inherit the changed attributes. The changes do not affect students who were assigned the older version of this template.

System fee type of Payment Plan: If you want to define a processing fee for payment plans, then you must create a fee type with the system fee type of **Payment Plan**. The processing fee is a charge assessed against a student's account and does not automatically update the payment plan balance.

Deletion: You cannot delete payment plan templates. A template can only be closed. The template may be reopened by deselecting the **Closed** check box and then be available for revisions and assignment.

Due Date Determination: All fields in this region are used to calculate the due dates of specific installments after this template is assigned to a student.

Installment Period: Enter the frequency of the installments.

Due Day of Month: Enter the day of the month when the installments are due. You can select 1 through 28 only. If you want the due day to be 30 or 31, then you must select the **Due at End of Month** check box. The 29th of the month is currently not an option.

Start Day Offset: Enter the number of days past the start date before the first installment is due. This offset days capability is used to prevent an installment from coming due too soon after the payment plan start date.

End of Month: If selected, then the due dates for installments for this payment plan template are due at the end of the month.

Administrative processing fee: The **Fee Type** and **Amount** fields determine the administrative processing fee for the payment plan.

Fee Type: Enter the fee type of system type Payment Plan for processing fee amount.

Amount: Enter the amount of the administration or processing fee associated to be charged to a student upon enrolling in this payment plan. This amount is passed to the Charges API to create a charge in the student account when the student commits to a payment plan.

Installment Allocation Region

Percent: Select this radio button if all installments are defined as percentages of the base amount.

Amounts: Select this radio button if all installments are defined by actual amounts. At least one installment must be defined in the multi-row region of the Payment Plan Template.

23.25 Rollover Student Finance Fee Types and Calendar

Roll over setup for fee types and calendars.

See Appendix E, "Implementation Concurrent Processes" for more information.

24.1 Research Overview

Research students are those who have applied for or enrolled in a research program and unit. The functionality provided through Research can be used in various ways to best suit your requirements. In addition to managing research students, some functions in the subsystem can also be used for student administration in other programs.

For example, an Architecture program can require a student to complete a project each year, in coursework units called Special Project 1, 2, and 3, that use the standard method for Full Time Equivalent calculation. The recording, tracking, monitoring, and examination of the student's project can use Candidacy and Thesis functionality from the Research windows. A student program attempt can have only one candidacy, but the candidacy can have multiple theses, so each year's project can become a new thesis.

Research Date Aliases and Administrative Unit Statuses

The Research subsystem requires unit discontinuation date aliases and administrative unit statuses to be created that allow withdrawal from research units without assessment penalties.

Research Programs

Each program offered by your institution has a program type attribute. Program types and their associated **Research** check boxes are maintained in the Program Types window. However, the **Research** check box must be selected for those program types for which you require a candidacy record be created during admission or for enrollment.

An applicant for admission to a program that has the **Research** check box selected cannot be offered a place or have the admission outcome status set to **Offer** or **Cond-offer** without creating a candidacy record and completing mandatory candidacy details. If a student program attempt is not created through the pre-enrollment process in Admissions, the same restrictions apply to direct enrollment and the student program attempt cannot be confirmed without completing mandatory candidacy details.

Each attendance type must have a research percentage defined as one of the attributes. The default attendance percentage for a candidacy record is derived from the attendance type research percentage. The attendance percentage can be adjusted in the research candidacy form.

A research program offered by your institution must have a minimum submission percentage entered to represent the minimum percentage of effective research days that must be completed before a thesis can be submitted. This field is defined in the Basic Program Details window. The minimum submission percentage contributes to the calculation of a candidate's minimum submission date.

Research Units

The Research subsystem requires unique research units to be set up for students in research-only programs or programs combining a research unit with course work units. The method used to derive Full Time Equivalency, or FTE, for research candidates enrolled in research units is different from the method used for students enrolled in non-research units. The research units and related details are entered in the Basic Unit Details window.

Selecting the **Override Title** check box overrides the unit title for a student unit attempt. For example, if a student enrolls in the Honors Research > Chemical Sciences unit as part of a course work honors program, then you can override this title and make it Honors Minor Thesis > Chemical Sciences.

The **Enrolled Credit Points** field calculates Effective Full-Time Student Units, or FTE, when a student enrolls in a unit in a non-research teaching period that does not calculate FTE using the research calculation method. Enrolled credit points ensure the unit enrollments are included in statistical reports to the government. If your institution configures calendars with research units offered in a summer teaching period that uses the standard FTE calculation, then an appropriate number of enrolled credit points should be entered.

Achievable credit points are the number of credit points awarded to a student upon successful completion of a unit. If no achievable credit points are entered, then Oracle Student System uses enrolled credit points. If zero achievable credit points

are entered, no credit points are awarded upon completion of a unit. In the latter case, you can award a Satisfactory Progress grade at the end of a semester, rather than credit points, for a research unit.

Enrollment in a research unit means that teaching responsibility and income distribution to organizational units within your institution are derived from the candidate's supervision arrangements. For this reason, ownership in the Basic Unit Details window and teaching responsibility in the Teaching Responsibilities window should be allocated to a non-academic organizational unit, such as the Research Office, when unit details are entered.

A research unit must be established for each discipline and research level offered by your institution. For example, if your institution offers research studies at four levels, Higher Doctorate, Doctorate, Masters, and Honors, for each discipline group offered by your institution, four research units are created, one for each research level.

All research units must be offered in all research teaching periods in order for a candidate's research to continue from one teaching period to the next. Create unit offerings in the Unit Offerings window, accessed from the Basic Unit Details window.

Research Grading Schema

Since research candidates are unlikely to complete their research and have their theses examined in a single teaching period, grading schema used in other areas of study are not appropriate for research units. You must establish an appropriate research grading schema in the Grading Schemas window.

The grading schema for research units is assigned in the Unit Sections window, accessed from the Unit Offerings window.

Research Tracking Types and Steps

Tracking types, linked to the system tracking types **RES_TEX** and **RES_TPM**, must be set up before thesis panel types or thesis panel member types if a tracking type is defined as an attribute of a thesis panel or thesis panel member type.

User-defined tracking types and their associated steps are set up using the Tracking Types window.

The following table describes the two system tracking types in the Research subsystem. Each system tracking type is associated with a system step type and a default recipient.

Table 24–1 Research Subsystem

System Tracking Type	System Tracking Type	Default Recipient
RES_TEX	RES_TEX_CH	Chair of thesis panel
None	RES_TEX_OR	Originator of tracking item
None	RES_TEX_PR	Principal supervisor
None	RES_TEX_ST	Candidate (student)
RES_TPM	RES_TPM_OR	Originator of tracking item
None	RES_TPM_PE	Examiner

Tracking types used to track a thesis examination must be defined as system tracking type **RES_TEX**. Tracking types used to track a thesis panel member must be defined as system tracking type **RES_TPM**.

The system step types are used to define steps for the system tracking type if the default recipient is the appropriate recipient for a particular set of steps. A system step type does not have to be associated with each system tracking type step.

When tracking items are created for a thesis examination or panel member, the default recipient is inserted in the system tracking type steps associated with the system step types corresponding to that default recipient.

Research Codes

Research codes allow reporting of information related to research students. The three sets of codes include:

- Type of Activity Classification Codes (TOA)
- Fields of Study (FOS)
- Socio-Economic Objective Classifications (SEO)

User-defined codes for Fields of Study and Socio-Economic Objective Classifications must be mapped to the corresponding government code.

24.2 Research Candidacy

The research candidacy tracks the student's progress toward the completion of a thesis.

24.2.1 Setting Up Milestone Types IGSRE001

Set up user-defined milestone types to mark a candidate's progress. Default milestones for a program version are established in the Program Default Research Milestones window.

Navigation

Enrollments > Research > Setups > Milestone Types

Additional Notes and Business Rules

Reminder: Enter the number of reminder days after the milestone due date. If no value is entered in the **Reminder** field, a value cannot be entered in the **Re-Reminder** field.

24.2.2 Setting Up Research Supervisor Types IGSRE002

Set up user-defined research supervisor types to classify each research candidate's supervisor. Research supervisors are assigned to research students in the Research Supervisors window.

Navigation

Enrollments > Research > Setups > Research Supervisor Types > Research Supervisor Types

Additional Notes and Business Rules

Research Supervisor Type: A research supervisor type must have a unique name.

Principal Supervisor: If this check box selected, then supervisor type represents a principal supervisor. For each research supervisor type, only one principal supervisor can be selected.

24.2.3 Setting Up Thesis Panel Types IGSRE003

Create user-defined thesis panel types to set up details for thesis examination panels. These constraints set up here are not validated.

Prerequisites

Tracking types are optionally set up.

Navigation

Enrollments > Research > Setups > Thesis Panel Types > Thesis Panel Types

Additional Notes and Business Rules

Recommended Panel Size: Enter a number to indicate the recommended panel size.

Selection Criteria: Enter selection criteria for panel members. Data in this field does not validate any other data.

Tracking Type: A user-defined tracking type that is mapped to the system tracking type **RES_TEX** can be assigned to a thesis panel type to provide tracking steps for setting up a thesis examination panel.

24.2.4 Setting Up Thesis Examination Types IGSRE004

Create user-defined thesis examination types to indicate the methods of reviewing a research candidate's thesis.

Navigation

Enrollments > Research > Setups > Thesis Examination Types > Thesis Examination Types

Additional Notes and Business Rules

Thesis Exam Type: Enter the type of examinations possible for research students. Examples include **Written**, **Performance**, and **Oral**.

24.2.5 Setting Up Thesis Panel Member Types IGSRE005

Create user-defined thesis panel member types to classify panel members.

Prerequisites

Tracking types are set up.

Navigation

Enrollments > Research > Setups > Thesis Panel Member Type > Thesis Panel Member Type

Additional Notes and Business Rules

Panel Chair: If selected, then thesis panel member type can be the chairperson of an examining panel.

Tracking Type: A user-defined tracking type that is mapped to the system tracking type **RES-TPM** can be assigned to a thesis panel member type to provide tracking steps for interactions with a panel member.

24.2.6 Setting Up Scholarship Types IGSRE006

Map user-defined scholarship types to classify scholarships awarded to students according to the organizational unit or person offering or supervising the scholarship.

Prerequisites

Person details are set up.

Organizational units are set up.

Navigation

Enrollments > Research > Setups > Scholarship Types > Scholarship Types

24.2.7 Setting Up Thesis Result Codes IGSRE007

Map user-defined thesis result code to system thesis result codes to represent the results of a thesis assessment.

System thesis result codes are **Major Revisions Required**, **Minor Revisions Required**, **No Result Recorded**, **Thesis Failed**, **Thesis Failed > Alternative Exit Offered**, and **Thesis Passed**.

Navigation

Enrollments > Research > Setups > Thesis Result Codes > Thesis Result Codes

Additional Notes and Business Rules

Thesis Result Code: Each thesis result code is assigned a final result indicator. Two of these result codes, **Minor Revisions Required** and **Major Revisions Required**, have their final result indicators set to **No** to allow for revision and resubmission of a thesis.

24.2.8 Setting Up Government Socio-Economic Classifications IGSRE008

Set up government socio-economic objective classification codes.

Navigation

Enrollments > Research > Setups > Government Socio-Economic

Additional Notes and Business Rules

Deletion: If a government socio-economic objective classification code is mapped to an institution-defined socio-economic objective classification code, it cannot be deleted.

Government Indicator: If selected, then objective classification code is a government socio-economic objective classification code.

24.2.9 Setting Up Socio-Economic Objective Classifications IGSRE009

Set up socio-economic objective classification codes to report information to the government about the research performed in your institution. Socio-economic objective classification codes classify research according to the social and economic objectives of the research.

Prerequisites

Government socio-economic objective classifications are set up.

Navigation

Enrollments > Research > Research Candidacy Details > Research Codes

24.2.10 Setting Up Government Type of Activity Classification Codes IGSRE010

Create government type of activity codes to enter statistics about research projects and reporting these statistics to the government.

Navigation

Enrollments > Research > Set Up Government Type of Activity Classification Codes

24.2.11 Setting Up Milestone Statuses IGSRE011

Map user-defined milestone statuses to system milestone statuses to mark significant achievements as candidates progress toward completion.

System milestone statuses are **Achieved**, **Failed**, **Planned**, and **Re-planned**.

Navigation

Enrollments > Research > Setups > Milestone Statuses > Milestone Statuses

24.3 Milestones

Set up milestones.

24.4 Setting Up Program Default Research Milestones IGSRE014

A standard set of milestones can be created for a program version. This set of program default milestones can then be used when establishing milestones for an individual candidate using the Candidacy Milestones window.

Prerequisites

Program attendance types are set up.

Basic program details are set up.

Programs are set to **Active** status.

Milestone types are set up.

Navigation

Enrollments > Research > Default Research Milestones

Additional Notes and Business Rules

Closed milestone types: A Closed milestone type cannot be entered.

Duplicates: Exact duplicates such as **Milestone Type** and number of **Offset Days** cannot be created in a set. No two milestones in a default set should be exactly the same as each other.

Deletion: Deleting any milestone from this set of program default research milestones does not affect existing candidate's milestones.

Offset Days: The offset days value is used to calculate the due date for this default milestone.

Due Date: The due date describes the number of days the milestone will be offset from the Candidate Commencement Date.

24.5 Research Calendar

Set up research calendars.

24.5.1 Research Calendar Configuration IGSRE012

Research does not have a specific calendar type. However, you can set up the teaching periods in which the research units are offered. When setting up the teaching periods for research, you must consider that these may not be the same as those for the standard teaching periods.

The date aliases are used to set when the research calendar start and end dates occur.

Prerequisites

Calendar types are set up.

Navigation

Enrollments > Research > Setups > Configure Research Calendar > Research Calendar Configuration

Additional Notes and Business Rules

Dates: Enter date aliases to represent effective start and end dates for a research teaching period.

25.1 Universities and Colleges Admissions Services Overview

The Universities and Colleges Admissions Service (UCAS) provides a central admission system for higher education institutions in the United Kingdom. Instead of applicants contacting institutions individually, applications for full time undergraduate, nursing, social work and teacher training courses are received and managed by the central clearing houses UCAS, NMAS, SWAS and GTTR. The primary task of the UCAS interface in Oracle Student System is to process applications from the central clearing houses, including the related transaction processing and reporting.

The UCAS interface enables users to perform the following actions:

- Import and maintain UCAS, NMAS, SWAS and GTTR reference data
- Import applicant and application details from UCAS and create person records in Oracle Student System
- Create and maintain offer condition templates in a generic offer library
- Export application detail, including the UCAS replies, to the Oracle Student System Admissions subsystem
- Make decisions on the applications and generate the UCAS transactions
- Export transactions, program alterations, and institution-specific offer codes to UCAS.

The UCAS interface supports both the HERCULES and Marvin UCAS systems.

UCAS functionality is enabled by setting IGS: Country Code profile option to **United Kingdom**.

Year of Program functionality is enabled by setting IGS: Career Model Enabled profile option to **No**.

To configure the UCAS interface, you must do the following:

- Define the UCAS profile option values
- Define system definition
- Define the current institution
- Set up UCAS interface details
- Import UCAS reference data including reference data, common data and the institution profile
- Maintain control details
- Map UCAS decision and reply codes to Admissions outcome status and offer response codes
- Map UCAS residential category to Oracle Student System person residency status
- Map UCAS previous education codes to Oracle Student System codes

25.2 Link Oracle Student System to UCAS HERCULES Databases

Your database administrator must create a database link to the HERCULES system. Details of the required database are documented in the UCAS HERCULES Manual and UCAS will supply the necessary username and password details.

CAUTION: Do not use multi-byte character sets. If a customer database is configured to use a multi-byte character set, for example, UTF8, then the UCAS Interface will not work.

25.3 UCAS Profile Options

Set up the following UCAS profile option:

- **IGS: Hold UCAS Transaction:** Set to indicate whether UCAS transactions generated or entered are automatically placed on hold to await administrator review and release. This currently only affects transactions raised via Admissions Self-service.

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, see *Oracle Applications User's Guide*.

25.4 UCAS System Details

Identify the UCAS Systems that you want to use.

25.4.1 Setting Up Definition of System Details IGSUC032

Use the Definition of System Details window to configure the system you plan to use. Systems include the following:

- GTTR
- NMAS
- SWAS
- UCAS

For each of these, you define the security number. This security number attached to the flat file helps UCAS identify the institution from which the flat file was received. Checking the Search Hercules Name ensures that for the SWAS/NMAS/GTTR application, the Hercules view cvname is checked.

Navigation

UCAS Interface > UCAS Setup > Definition of System Details

Additional Notes and Business Rules

Security Key: Enter the number attached to the flat file. This value indicates institution from which file was received. This security key for the given system ID is used while sending the data file to MARVIN. The security key must be the same for all systems.

Marvin File Sequence Number: Sequence number of the latest MARVIN movement section to be successfully processed for each UCAS subsystem. Applicable only when using MARVIN interface.

Clearing Allowed: If selected, then CLEARING processing period is allowed.

Extra Processing Allowed: If selected, then Extra processing is allowed.

Search Hercules Name: If selected, then HERCULES view cvname will be checked when an application inquiry is recorded.

25.5 Start Admissions Cycle

For each new admissions cycle, you must import UCAS data. You must also define calendars to use within that active admissions cycle.

The UCAS Setup window allows you to define the UCAS admissions cycles, the admissions calendars and default values used when importing data from the UCAS interface to Oracle Student System. The UCAS Setup window allows you to specify the default day and month to be used when importing the previous institution date left from UCAS.

Run the Start UCAS Cycle concurrent process for new installations and to move to a new UCAS cycle.

See "System Wide Services: Calendar" for information about defining calendars.

See *Oracle Student System for the United Kingdom User Guide* for information about starting new UCAS cycles.

25.6 Configure Admissions Cycle

Run the Configure for UCAS Cycle concurrent process to configure Oracle Student System to work with a particular UCAS admissions cycle.

See *Oracle Student System for the United Kingdom User Guide* for information about configuring the admissions cycle.

25.7 Define the Current Institution

Before reference data can be imported from UCAS, the UCAS institution code for your institution must be defined as an institution in UCAS Common Data.

As part of reference data, UCAS supplies a complete list of all UK institutions and their institution codes. One of these must be selected to populate the current institution code in the setup window.

This setup must be populated before the first download from Hercules (before the Process UCAS Data concurrent process can be run). You must enter your own code manually in the Monitor Common Data window and use this to complete your setup. You can then run the concurrent process to import all other codes.

See Monitoring Common Data in the UCAS chapter in *Oracle Student System for the United Kingdom User Guide* for information about creating an institution.

25.8 Setting Up UCAS Interface

The UCAS Setup window contains default information used in the UCAS interface and for exporting applications to Oracle Student System. System administrators can define the following information:

- Academic and admissions calendars
- Test data for sending test transactions to UCAS
- Admission process category and type, Admissions Outcome, Decision Reason and Decision maker codes used when importing applications and the alternate person id type corresponding the UK National Insurance Number

Set Up UCAS Interface Defaults

The default information used during the UCAS and Oracle Student System import process is defined in the UCAS Setup window. The following data must be defined:

- UCAS institution identification code and format of the UCAS applicant numbers
- Applicant number, choice number, and the transaction type to be used while sending test transactions to UCAS
- Oracle Student System calendars, the admission process category and type, the admission outcome, decision reason, decision maker and national insurance number alternate person id type to be used when importing applicant and application details from the UCAS interface subsystem to core Oracle Student System

Prerequisites

Calendars are set up.

Admission categories are set up.

Admission process category details are set up.

Application types are set up.

Alternate person id types are set up.

Admission decision reasons are set up.

Admission outcome statuses are set up.

Navigation

UCAS Interface > UCAS Setup > UCAS Setup

Additional Notes and Business Rules

Previous Institution Leaving Day/Month: This field holds the default day and month used to construct the academic history and effective to date from the UCAS year left previous institution value.

UCAS Cycle: Enter the list of UCAS admissions cycles supported by Oracle Student System.

Clearing: If selected, then clearing is allowed.

Extra: If selected, then the EXTRA process is operated by your institution.

Search Hercules Names: If selected, then the Hercules view cvname which includes details of all UCAS applications is searched when a Clearing or Extra enquiry is recorded.

Year and month of entry: Year and month of entry are independent of the UCAS cycle. For example, within the UCAS cycle 2004, calendar mappings can be defined for applications with year of entry 04 for applications for the current year and for year of entry 05 for deferred applications.

Academic Calendar: Enter a user-defined academic year calendar that is used as default when exporting UCAS applications to the Oracle Student System.

Admission Calendar: Enter a user-defined admissions calendar that is used as default when exporting UCAS applications to the Oracle Student System.

Test Data tab: This tab is only enabled if you are using Hercules.

Applicant Number: Enter an applicant number to use for test transactions sent to UCAS. It must be the UCAS applicant number of an applicant to your institution.

Choice Number: Enter a choice number to use for test transactions sent to UCAS. It must be numeric and the choice number of an application from the selected applicant.

Transaction Type: Enter a test transaction type. Valid values are XA, experimental amended decision, or XD, experimental first decision.

Admission Process Category: Enter an admission category code to use as default when exporting application records to Oracle Student System.

Admission Process Type: Enter an admission type to use as default when exporting records to Oracle Student System. This field is display only unless admission process category is selected.

Admission Number Format: Specify the UCAS application number format when displayed in UCAS reports. It must consist of nine digits and any required punctuation, for example 12-12345-67.

Current Institution Code: Enter the UCAS code of institution where Oracle Student System software is installed.

NI Number Type: Specify the alternate person id type used for National Insurance Number.

Decision Maker Number: Enter the person number to populate the decision maker number in the admissions decision import process when importing bulk reject decisions from UCAS.

Decision Reason: Enter the Oracle Student System user-defined decision reason to populate the decision reason in the admissions decision import process when importing a bulk reject decision from UCAS.

Pending Outcome Status: Enter the Oracle Student System user-defined outcome status to populate the outcome status in the admissions decision import process when importing the bulk reject decision from UCAS.

Obsolete Outcome Status: Enter the Oracle Student System user-defined outcome status used to populate the outcome status in the admissions decision import process when obsoleting an application

Rejected Outcome Status: Enter the Oracle Student System user-defined outcome status to populate the outcome status in the admissions decision import process importing a bulk reject decision from UCAS.

Year and month of entry: Year and month of entry are independent of the UCAS cycle. For example, within the UCAS cycle 2004, calendar mappings can be defined for applications with year of entry 04 for applications for the current year and for year of entry 05 for deferred applications.

Month 0: Month 0 is used to provide a default for the year. Instead of defining an entry for every Year/Month combination, all mapping to the same academic and admission calendar combination a single entry for the year with month 0 can be defined. During processing of the application if the Year/Month combination is not found, then the Month 0 entry for the year is used.

25.9 Import UCAS Reference Data

Import UCAS Reference Data to allow proper processing of UCAS Applications. Reference Data is used to supply descriptions and control functions to coded data received with an application.

25.9.1 Import UCAS Reference Data

Import UCAS reference and common data from UCAS into the Oracle Student System UCAS subsystem through the Hercules interface.

Load additional reference data made available by UCAS as flat files for the small systems into the UCAS reference data tables.

25.9.1.1 Import UCAS Reference and Common Data

Reference data includes generic UCAS codes for exam level, awarding body, offer subject, domicile, offer abbreviations, disability, transaction error codes, establishment groups, ethnicity, sponsor codes, key words, other educational qualifications, occupation codes, residential category, school type, status codes, subject codes, UCAS groups UCAS tariff social and socio-economic classes, Pre-2000 occupation codes, and joint admission entities, GTTR degree subjects.

Common data includes the UCAS Higher Education institutions, schools, and Exam Board Listing examination subjects.

Prerequisites

Your database administrator created database link to Hercules.

UCAS setup is complete.

Additional Notes and Business Rules

Concurrent process: Run the Load Hercules Data Process concurrent process.

See *Oracle Student System for the United Kingdom User Guide* for information about this concurrent process.

25.9.2 Load GTTR Degree Subjects

UCAS provides the GTTR subject codes as a flat file that can be downloaded from the UCAS firewall. The file must be saved onto a file system accessible by the concurrent manager.

Navigation

Requests > Concurrent Manager > Requests > Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Degree Subjects for GTTR System

2. Enter the full directory path and filename of the file of GTTR subject codes for the filename parameter.
3. Submit the request.
4. When complete review log file for any errors.

25.9.3 Load Small Systems Institutions

The institution reference data available on Hercules does not include the institutions for the small systems. This data is made available as flat files, one per system. The files must be retrieved from the firewall and saved in a file system accessible to the concurrent manager.

Navigation

Requests > Concurrent Manager > Requests > Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Institution Code Files

2. Enter the full directory path and filename of the file of institutions code file to be loaded. Enter the system code.
3. Submit the request.
4. When complete review log file for any errors.

25.9.4 Load Small Systems Error Codes

The institution reference data available on Hercules does not include the transaction error codes for the small systems. This data is made available as flat files, one per system. The files must be retrieved from the firewall and saved in a file system accessible to the concurrent manager.

Navigation

Requests > Concurrent Manager > Requests > Run Request Set

Steps

1. Select or enter the request set:

Load Marvin Error Code Files

2. Enter the full directory path and filename of the file of institutions code file to be loaded. Enter the system code.
3. Submit the request.
4. When complete review log file for any errors.

25.9.5 Process UCAS Data Concurrent Process

After you import from UCAS into reference tables, you must run the Process UCAS Data Process concurrent process to validate the data loaded from UCAS and load the valid data from the UCAS load interface tables and into the UCAS interface table.

Navigation

Requests > Concurrent Manager > Requests > Run

Steps

1. Select or enter the request:

Process UCAS Data

2. Submit the request.
3. To determine any errors, select or enter the request:

Process UCAS Data Error Report

4. View the report and correct any errors.

25.10 Setting Up Control Details for Small Systems

View control information imported from UCAS and set up control details for small systems.

Navigation

UCAS Interface > UCAS Data Control > View Control Information > UCAS Control Information

Additional Notes and Business Rules

Time of Year: This field displays current time of year reached in UCAS processing.

Time of Day: This field displays the processing status of the UCAS system at the time when the Load HERCULES data was last run.

First: This field displays first applicant number in use.

Maximum: This field displays highest applicant number available.

Last: This field displays applicant number entered most recently.

First Over Seas Partnership: This field displays first applicant number registered as overseas application.

First RPA Non EU: This field displays first applicant number with record of prior acceptance from outside European Union.

First RPA EU: This field displays first applicant number with record of prior acceptance from within European Union.

Last Daily Run Number: This field displays reference number for last daily processing run.

Last Daily Run Date: This field displays date of last daily processing run.

Last Application by Advisory Closing Date: This field displays reference number of last application received before UCAS closing date for standard or Route A applications.

Date of Advisory Closing Date Run: This field displays date of final processing run for all standard or Route A UCAS applications.

Last Application by Route B Closing Date: This field displays reference number of last application received before UCAS closing date for Route B applications.

Date of Route B Closing Date Run: This field displays date of final processing run for all Route B UCAS applications.

Last App. in Decision Processing Run: This field displays reference number of last application number in the processing run for decisions.

Date of Decision Processing Run: This field displays date of final processing run for all application decisions.

News: This field displays supplemental update information imported from UCAS.

No More Amended Decision Transactions: If selected, then no further amended decisions are available from UCAS.

Star X Data Available: If selected, then Star X HESA data available from UCAS.

Extra Processing Start Date: This field displays date UCAS Extra processing starts.

Last Passport Application Date: This field displays date by which applicants must have applied for an Extra Passport.

Last LE Transaction Date: This field displays last date UCAS will accept and process LE transactions.

Entry Year: Enter the year of entry for current application cycle.

First Application Number: The range cannot overlap with other ranges.

Maximum Application Number: The range cannot overlap with other ranges.

Time of Year: Enter the NMAS time of year. Valid values include Null (clearing not started), A (CEFs sent to applicants), and C (clearing started).

25.11 UCAS Decision/Reply Code Mappings

UCAS application choices include the standard UCAS decision and reply codes. When applications are exported from the UCAS interface to Oracle Student System, the decision and reply codes are mapped to Oracle Student System application outcome statuses and offer responses. Map UCAS decisions to Oracle Student System application outcome statuses and UCAS decisions and replies to Oracle Student System offer responses.

Prerequisites

Define admissions user outcome statuses are set up.

Define admissions user offer responses are set up.

Navigation

UCAS Interface > UCAS Setup > UCAS Code Mappings

Additional Notes and Business Rules

UCAS System: This field displays the code that identifies the UCAS admissions system to which the mapping applies.

UCAS Decision: Enter the UCAS decision code that you can take on an application choice. The text entered must be a valid UCAS decision code. The decision code must be valid for the chosen UCAS admissions system.

Default Flag: If selected, then the default user outcome status is assigned to an application instance when the outcome status is set from the decision being imported from UCAS.

UCAS Decision Description: This field displays the description of lookup type IGS_UP_APP_DECISION.

System Outcome Display Description: This field displays the description of lookup type ADM_OUTCOME_STATUS associated with the UCAS decision outcome status.

User Offer Response: Enter the Oracle Student System offer response code to which the UCAS decision/reply combination maps.

25.12 Map UCAS Residential Category to Person Residency

The UCAS applicant residential category is imported to the Oracle Student System as the person's residence. The UCAS residential category is mapped to an Oracle Student System person residency status. The mapping associations, specifying the Oracle Student System residency status to be mapped to UCAS residency category, are defined as part of the seed data.

Prerequisites

Person Residency Status lookup is set up.

Navigation

HESA Returns > HESA Setup > Maintain Code Mappings

Query the association code UC_OSS_RESCAT_ASSOC.

Additional Notes and Business Rules

Mapping: Map UCAS RESCAT, the UCAS residential category code, to OSS Rescat, the Oracle Student System person residency status code.

See Chapter 27, "HESA" for more information.

25.13 Map UCAS, Oracle Student System, and HESA Reference Data

Map UCAS, Oracle Student System, and HESA reference data to ensure that all the data for all systems match.

See Chapter 27, "HESA" for information about HESA reference data.

25.14 Map UCAS Previous Education Codes to OSS Codes

Before the applicant previous education and qualification details information can be exported from the UCAS interface to Oracle Student System, the UCAS codes must be mapped to Oracle Student System codes. This includes:

- Mapping UCAS schools to previous institutions
- Mapping UCAS exam board codes to institutions
- Mapping UCAS levels to Awards
- Mapping UCAS subject codes to the Student System fields of study

Seed data is provided for each of the following mappings:

- **UCAS School to Oracle Student System institutions:** UC_OSS_HE_INS_ASSOC
- **UCAS exam boards to Oracle Student System institutions:** UCAS_OSS_AWD_BDY_ASSOC
- **UCAS Exam Board Levels to Oracle Student System Awards:** UCAS_OSS_AWD_ASSOC
- **UCAS Subject Codes to Oracle Student System Fields of Study:** UCAS_OSS_SBJ_ASSOC

and the mappings are maintained using the HESA Maintain Code Mappings window.

Prerequisites

Institutions are set up.

Awards for entry qualifications are set up.

Grading schema for entry qualifications are set up.

Program fields of study are set up.

Navigation

HESA Returns > HESA Setup > Maintain Code Mappings

Query the association code.

Additional Notes and Business Rules

Mapping: For each mapping, enter description, UCAS Code, and Oracle Student System Code.

For further details on using the Maintain Code Mappings window, see Chapter 27, "HESA".

26.1 Financial Aid Overview

Oracle Student System Financial Aid manages student financial aid programs for higher education.

Institutions in the United States use Oracle Financial Aid functionality to enter and process grants and loans given by the United States Federal Government to students planning to attend or attending higher education institutions.

For Financial Aid functionality to perform as designed for United States institutions, career functionality must be enabled and the preferred alternate ID must be Social Security number.

26.2 Financial Aid Profile Options

Set up the following Financial Aid profile option:

- **IGS: Participate in US Financial Aid Programs:** Set to indicate if you participate in U.S. government Financial Aid programs.
- **IGF: Always use lowest of Institutional or Federal Need:** Set to use institutional or federal needs
- **IGF: INAS Integrated:** Indicate if you have implemented the INAS calculator

Selecting the IGS: Country Code GB United Kingdom profile option disables some Financial Aid functionality.

See Appendix B, "Oracle Student System Profile Options" for detailed information about Oracle Student System profile options.

For information on how to set profile options, refer to the *Oracle Applications User's Guide*.

26.3 Financial Aid Options

Set up financial aid options to support participation in federal financial aid programs and import Institutional Student Information Record (ISIR) and PROFILE records.

26.3.1 Setting Up System Award Year Mapping IGFAP018

Map the system award year to a calendar award year. The system award year represents the annual information and file layouts attributes defined by the U. S. Department of Education and the College Board used in processing financial aid for any given industry-standard award year. A one-to-one mapping exists between the system award year and the calendar award year.

Load calendars (terms) are mapped directly to calendar award years and a single load calendar can be mapped to multiple calendar award years. This mapping determines what terms are available to create student costs of attendance and set up fund distribution options.

You can make a distinction between data from **Open** award years where processing is still in progress and **Closed** award years where processing of data is complete.

This window is view- only for award year statuses of **Legacy Details** or **Closed**.

Statuses

Statuses distinguish legacy data imported from legacy systems (and not used in financial aid processing) from live data that is used in financial aid processing.

Legacy Ending Balances (Required):

- This status represents the award year where for each student, the aggregate award ending balances (this is the aggregate award total for all award years up to the designated award year) compiled in the legacy system are converted to Oracle Student System Financial Aid.
- This status is required to identify the start of the legacy conversion process and data from this award year may be used in determining award aggregate totals as part of the auto awarding processes.
- There can only be one award year with this status. Whether your institution chooses to convert aggregate award amounts for one or multiple award years, the legacy ending balances are required to support continued financial aid processing in Oracle Student System Financial Aid. Legacy financial aid details are for viewing past years' data and for processes that use historical data only.

No further financial aid processing is supported within the Financial Aid subsystem for award years with a Legacy Ending Balances status.

- This award year can go back as far as the legacy system has data to support the aggregate awards. The award year must precede any award years with the status **Legacy Aggregate Awards**, **Legacy Details** and **Open**.
- This status cannot be updated after legacy data for the defined award year has been imported to the Financial Aid subsystem. If you choose not to import any legacy data, award aggregate totals of 0 (zero) must at least be imported.

Legacy Aggregate Awards (Optional):

- This status represents an award year where for each student only the aggregate award data for a single designated award year is converted from the legacy system.
- Legacy financial aid details are for viewing past years' data and for processes that use historical data only. No further financial aid processing is supported within the Financial Aid subsystem. This award year can go back as far as the legacy system has data to support the aggregate awards.
- Award years can only be designated Legacy Aggregate Awards if they come after the legacy ending balances award year and before any **Legacy Details** or **Open** award years.
- This status cannot be updated after legacy data for the defined award year has been imported to the Financial Aid subsystem.

Legacy Details (Optional):

- This status represents an award year in which the detail financial aid data is converted from the legacy system for each student. The further processing of data is not allowed within the Financial Aid subsystem. There is no limit to the number of award years that can be assigned this status, however no award year prior to award year 2002 -2003 can be assigned this status. Award years with this status may only precede award years with status **Open**.
- This status cannot be updated after legacy data for the defined award year has been imported to the Financial Aid subsystem.

Open (Required):

- This status represents an award year in which the financial aid detail data converted from the legacy system can be processed in the Oracle Student System Financial Aid module. No award year prior to system award year 2002 -2003 may be assigned this status.

- After an **Open** year has passed its usable life span, you can update the status to **Closed**.

Closed (Optional):

- This status represents an award year in which the processing of data (by financial aid processes) is not allowed. A **Closed** award year may have its status updated to **Open** to enable financial aid processing for that award year. This is typically done on a rare exception basis by an administrator with a high level of security.

CAUTION: You should be very careful when setting up the System Award Year Mappings window. Before using the window, you must consider how many award years you will be setting up and which statuses you will give them.

You can set up Award Years for which you do not intend to import legacy data immediately. However, you may not go back and create earlier awards years after legacy data has been imported.

Institutions with a country code other than US or those that do not wish to participate in US Financial Aid programs will only have access to **Open** and **Closed** award year statuses.

Prerequisites

Calendar types are set up.

Navigation

Financial Aid > Setup > Application Processing > System Award Year Mappings

Additional Notes and Business Rules

System: Enter the system award year which determines federal award year specific characteristics.

Award Year Status: This field differentiates award years that are open to Financial Aid processing from those that are closed to processing. It also depicts which years contain historical legacy data.

If **Yes** is selected for the profile option IGS: Participate in US Financial Aid Programs and the Country Code selected is **US**, then the list of values displays the following values:

- Legacy Ending Balances
- Legacy Aggregate Awards

- Legacy Details
- Open
- Closed

If some other combination of values are selected for the above two profile options, then the list of values displays the following values:

- Open
- Closed

After legacy data has been imported into Oracle Student System, the following statuses are longer updateable:

- Legacy Ending Balances
- Legacy Aggregate Awards
- Legacy Details

26.3.2 Setting Up Record Matching Criteria IGFAP023

Set up matching criteria for the person matching process.

Navigation

Financial Aid > Setup > Application Processing > Record Matching Criteria > Record Matching Criteria

Additional Notes and Business Rules

Valid match weight: The valid match weight for SSN, Given Name, Surname, Date of Birth, Street Address, City, and Postal Code is between 0 and 5. Match weight is the score given if the criterion matches.

Minimum Score for Automatic Creation of FA Base Record: The valid minimum score for Automatic Creation of FA Base Record is between 0 and 35.

Minimum Score for Manual Review to Create FA Base Record: The valid score Manual Review to Create FA Base Record is between 0 and 35.

26.3.3 Setting Up Application Processing Import Parameters IGFAP002

Set up the parameters that help define user preferences for the ISIR and PROFILE import processes.

Navigation

Financial Aid > Setup > Application Processing > Application Processing Parameters

Additional Notes and Business Rules

SSN Required for Base Record Creation: If selected, then Social Security number is required for base record creation.

Manual Review of Application: If selected, then you manually review applications to update the application process status to **Application Complete**.

26.3.4 Setting Up Institutional Application Setup IGFAP010

Define questions your institution uses to collect information about students that is not collected by other applications or documents. You can define questions to collect information about students which are not collected on the FAFSA or PROFILE forms. These questions can be changed from award year to award year.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Navigation

Financial Aid > Setup > Application Processing > Institutional Application > Institutional Application

Additional Notes and Business Rules

Enabled: If selected, then question is displayed for the selected award year.

26.4 To Do Item Tracking

Students can be assigned To Do Items (specific actions or documents required) in order to complete the Financial Aid process. One way that students who need to complete To Do Items are identified is by the use of external query tools against the Student/Financial Aid Base Record database for creation of person ID groups. These person ID groups can then be used as parameters in assigning To Do Items to students. To Do items are assigned by defining a group of students and assigning a particular item to those students. The definition of the group is performed by using a query tool to search the database and select the right students for the group.

Verification To Do Items work in the same manner as other To Do Items except that they also identify elements of the ISIR that require verification to populate the Federal Verification Worksheet. Data elements are entered and compared with the Active ISIR record. All discrepancies between ISIR data being verified and the documented values entered into the Federal Verification Worksheet must be sent as corrections to the U.S. Department of Education's Central Processor for generation of a corrected ISIR. It is your responsibility to send these discrepancies to the Department of Education.

26.4.1 Setting Up To Do Items IGFAP027

Define To Do Items to be used in Financial Aid. You can create a master list of To Do list items that can be assigned to a student's Track To Do List.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Award years are set up.

Navigation

Financial Aid > Setup > Application Processing > To Do Items

Additional Notes and Business Rules

Max. Attempts: Enter the maximum number of times to request a To Do Item through correspondence.

Attempt frequency Days: Enter how frequently a To Do Item will be requested through correspondence.

Career Item: If selected, then record is a career item and must be verified only one time in the student's career.

Required for Completion: If selected, then To Do item is required to be complete before the students Financial Aid process status can be changed to Application Complete.

Correspondence Text: Enter text to be used for item selected when sending To Do Item correspondence.

26.4.2 Financial Aid Lookup Values for To Do Item Details

You must define financial aid lookup codes to use the optional To Do Item Details functionality.

Navigation

Financial Aid > Setups > Lookups

Additional Notes and Business Rules

Query the type IGF_AP_INC_REASON and enter user-defined codes to support recording To Do item incomplete reasons.

Query the type IGF_AP_REQ_CODE to support recording To Do item requirement codes.

26.5 Federal Pell Grant

The Federal Pell Grant program provides funding for high-need undergraduate students. The sum awarded is determined by the U.S. Department of Education based on the student's cost of attendance, expected family contribution, and enrollment status.

You must ensure that each recipient meets the eligibility requirements for the Federal Pell Grant Program and that payment is made to eligible students.

The Common Origination and Disbursement (COD) System requires that you originate Federal Pell Grants prior to disbursement. The electronic processing of COD is similar to the Federal Direct Loan Program.

You can manage the processing of a Pell Grant award for an undergraduate student by performing the following:

- Enter and maintain Pell Grant setup related reference data
- Manage disbursement related dates
- Define origination processes
- Manage data requests
- Manage Common Origination and Disbursement (COD) System processes
- Manage funding methods in the Federal Pell Grant Program

26.5.1 Setting Up Pell Setup IGFG003

Set up all the related Pell Grant academic, payment, alternate schedule limits, and funding method setup values in the context of a Reporting Pell ID. Enter these default values each year during regulatory setup.

This window displays the Pell defaults for a particular reporting Pell ID. Data from the Pell setup is used in the creation of Pell origination files. The Pell record created for each Pell eligible student is batched and sent as origination files for processing. After the reporting Pell ID is entered, default Pell setup can take place.

Set the following defaults for the Pell origination file:

- Reporting Pell ID
- Low tuition and fees code
- Alternate schedule factors which determines if low tuition code is applicable
- Academic calendar
- Payment method
- Weeks of instructional time used to calculate payment
- Weeks of institution time in program's definition of academic year
- Credit or clock hours in all payment periods expected to complete the current school year

Prerequisites

Award years are set up.

Identifiers are set up as alternate ID types.

Pell ID relationships are set up.

Navigation

Financial Aid > Setup > Pell Grant Processing > Pell Setup

Additional Notes and Business Rules

View-only: This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Reporting Pell ID: Enter the Pell ID of the Reporting Campus. This list of values is retrieved from the Reporting Pell ID field on the Pell Relationship window. The OPE ID number that is assigned to the Reporting Pell ID on this window is used

when creating and sending Pell Origination records to the Common Origination and Disbursement System (COD).

Enrollment Information Region

Academic Calendar: Select the appropriate Pell Grant academic calendar:

- **1 - Credit Hours:** Non-standard terms
- **2 - Credit Hours:** Standard terms of quarters
- **3 - Credit Hours:** Standard terms of semesters
- **4 - Credit Hours:** Standard terms of trimesters

Academic Weeks: Enter the total number of weeks of instructional time in your academic year. This field is used to calculate payment for a particular field.

Payment Method: Select the appropriate Pell Grant payment method:

- **1 - Standard Term:** Academic year more than 30 weeks
- **2 - Standard Term:** Academic year less than 30 weeks
- **3 - Any Term Based, Credit hour program**

For payment method **1**, academic weeks and payment weeks are not used. You should keep the fields null. The value in the **Payment Periods** field must not exceed the number of terms in an award year.

For payment methods **2** and **3**, academic weeks and payment weeks must have a value between **30** and **78**.

Payment Weeks: Enter the total amount of weeks of instructional time in your payment period. This field is used to calculate payment for a particular period.

Payment Periods: Enter the number of Pell payment periods. The value in this field must not exceed the number of terms in an award year.

Enrollment Status Determination Region

Before Term Start: Enter the attendance type to be used before term start.

Term in Progress: Enter the attendance type to be used for term in progress.

After Term Census: Enter the attendance type to be used after term census.

Valid Attendance Types:

- Actual Attendance Type
- FAFSA Anticipated Attendance Type

- Full Time Attendance Type
- Half Time Attendance Type
- Less Than Half Time
- Program Nominated Attendance Type
- Three Quarter Time

Alternate Schedule Limits Region

Expenses: Enter the maximum amount of Pell alternate expenses that are required for alternate schedule.

Cost of Attendance: Enter the minimum amount of cost of attendance that is required for using alternate schedule.

Family Contribution: Enter the maximum amount of family contribution amount that is required for using alternate schedule.

Funding Method Region

Advance: Select this radio button if you accept advance payment methods.

Just In Time: Select this radio button if you accept just in time payments.

26.5.1.1 Setting Up Pell Setup Overrides

You can override the following Pell setup values for academic programs:

Enrollment Information Region

- Academic calendar
- Academic weeks
- Payment method
- Payment weeks
- Payment periods

Enrollment Status Determination Region

- Before term start
- Term in progress
- After term census

Prerequisites

Award years are set up.

Identifiers are set up as alternate ID types.

Navigation

Financial Aid > Setup > Pell Grant Processing > Pell Setup > Pell Setup Override

26.5.2 Setting Up Pell Regular Schedule IGFR006

Enter the Federal Pell Grant Regular Payment Schedule provided by the U.S. Department of Education. It is your responsibility to obtain this schedule.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Award years are set up.

Navigation

Financial Aid > Setup > Pell Grant Processing > Pell Regular Schedule

Additional Notes and Business Rules

Entering data: Use the Pell Payment Schedule provided by the Department of Education.

Award Year: Depending on the award year selected, the **Effective Dates** field is automatically populated.

26.5.3 Setting Up Pell Alternate Schedule IGFR008

Enter the Federal Pell Grant Alternate Payment Schedule provided by the U.S. Department of Education (ED). This payment schedule is used to determine the Federal Pell Grant awards for students at a low tuition school as determined by ED. It is your responsibility to obtain this schedule.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Award year are set up.

Low tuition and fees codes must be set up.

Navigation

Financial Aid > Setup > Pell Grant Processing > Federal Pell Alternate Schedule

Additional Notes and Business Rules

Entering data: Use the Alternate Pell Payment Schedule provided by the Department of Education.

Award Year: Depending on the award year selected, the Effective Dates field is automatically populated.

26.5.4 Setting Up Low Tuition and Fees Codes IGFR009

Enter low tuition and fees codes that are defined by the US Department of Education. This setup is required if you are using the Federal Pell Grant Alternate Payment schedule. This setup is not required for UK institutions.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Award years are set up.

Navigation

Financial Aid > Setup > Pell Grant Processing > Low Tuition and Fees Code

Additional Notes and Business Rules

Code: You must enter either a numeric or alphabetical value.

Range Start: Beginning value of low tuition fees and code value is defined by the US Department of Education. You must enter a numeric value.

Range End: Ending value of low tuition fees and code value is defined by the US Department of Education. You must enter a numeric value.

26.5.5 Setting Up Financial Aid Attendance Type Mapping IGFA032

Map the program attendance types defined in Oracle Student System to the Financial Aid attendance types. These must be set up for the Pell Grant, FFELP, and Direct Loan programs.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Program attendance types are set up.

Award years are set up.

Navigation

Financial Aid > Setup > Application Processing > Enrollment > Financial Aid
Attendance Types

26.5.6 Setting Up Pell ID Relationships IGFR010

Establish a relationship between the Reporting Pell Campus IDs and Attending Pell Campus IDs in a context award year. Each Pell Grant identifier must be categorized either as a **Reporting Pell ID** or as **Attending Pell ID**. These values are used in the header and transaction records for a Pell Grant and are mandatory fields to report Pell Grant data to the Common Origination and Disbursement (COD) system.

Prerequisites

Identifiers are set up as alternate ID types in organizational setup.

Navigation

Oracle Student System > Financial Aid > Setup > Pell Grant Processing > Pell ID
Relationship

Additional Notes and Business Rules

Award year: Reporting pell campus and attending pell relationship are specific to the award year and must be set up for every award year.

Deletion: Deletion of Reporting Pell Campus ID is allowed only if none of the child Attending Pell Campus IDs have been used by the Pell Origination processes.

Mapping: The same Attending Pell Campus ID cannot be mapped to more than one Reporting Pell Campus ID in the award year.

Office of Postsecondary Education ID (OPEID) field: This is automatically populated from organizational unit setup. This functionality allows Federal Pell Grant reporting for institutions that have complex reporting needs for different Pell Grant identifiers used by different organizational units at your institution.

26.6 FFELP and Alternative Loans

Oracle Student System uses the CommonLine 5 standard for transmission of FFELP and Alternative Loan data. The following loans are processed using the CommonLine 5 standard:

- Federal Stafford Subsidized Loans
- Federal Stafford Unsubsidized Loans
- Federal PLUS Loans
- Alternative Loans

26.6.1 Setting Up Lender Codes IGFSL001

Enter and maintain the lender IDs and the lender non-US Department of Education branch IDs.

Prerequisites

Institution and organizational unit details for the lender are set up prior to setting up the lender codes to facilitate the linking of lender code and lender institution.

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Lender Codes Setup

Additional Notes and Business Rules

Institution Details: Clicking this button displays the servicer details for servicer in context if servicer id is defined as alternate id for the organization structure.

Org Unit Details: Clicking this button automatically populates information defined in organizational unit for service in context.

26.6.2 Setting Up Guarantor Codes IGFSL002

Enter and maintain the guarantors' details.

Prerequisites

Institutional details for the guarantor are set up prior to setting up the guarantor codes to facilitate the linking between guarantor code and guarantor institution.

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Guarantor Codes Setup

Additional Notes and Business Rules

Institution Details: Clicking this button displays the guarantor details for guarantor in context if guarantor id is defined as alternate id for the organization structure.

26.6.3 Setting Up Servicer Codes IGFSL010

Maintain the servicer IDs and the servicer non-US Department of Education branch IDs.

Prerequisites

Institutional details for the servicer and appropriate branches are set up prior to setting up the service and branch codes to facilitate the linking between servicer code, servicer institution, and branch IDs.

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Servicer Codes Setup

Additional Notes and Business Rules

Institution Details: Clicking this button displays the servicer details for servicer in context if servicer id is defined as alternate id for the organization structure.

Org Unit Details: Clicking this button automatically populates information defined in organizational unit for service in context.

26.6.4 Setting Up Lender Relationships IGFSL011

Maintain the lender, guarantor, and recipient relationships. The relationship between the lender, guarantor, and servicer can vary from lender to lender. A lender can have loans guaranteed by multiple guarantee agencies or the guarantee agency can guarantee loans for several lenders. Establishing the relationships defines the loan process among the lender, servicer, and guarantor.

Prerequisites

Lender codes are set up.

Guarantor codes are set up.

Servicer codes are set up.

Navigation

Financial Aid > Setup > Loan Processing > FFELP > Lender Relationships > Lender Relationships

Additional Notes and Business Rules

Unique combination: Lender ID, Lender Non-ED Branch ID, Guarantor ID, Recipient ID, Recipient Non-ED Branch ID must be a unique combination.

Lender branches: If the lender does not have any branches, then lender non-ED branch ID details cannot be entered.

Unique code: The user-define lender relationship code must be unique.

Active: Only active lender relationships display in windows and self service pages in which Lender Relationships field appears.

Modification and deletion: You cannot modify or delete a lender relationship if it is used in another window.

26.6.5 Setting Up FFELP Processing Setup IGFSL004

Maintain the FFELP loan setup details. The FFELP electronic process allows you to originate loans and receive funds for loans electronically.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Lender relationships are set up.

Calendar types are set up.

Award year are set up.

Navigation

Financial Aid > Setup > Loan Processing > FFELP > FFELP Setup > FFELP Setup

Additional Notes and Business Rules

Fee Region

Enter the estimated loan fees that will be deducted from the loan gross amounts to arrive at the loan net amounts at the disbursement level.

Application Region

Processing Type: Value is defaulted to **Guarantee Loans** (before Promissory Notes and print.

Requested Serial Loan: Values are **New - Request for a New Promissory Note** and **Serial - Request for Serial Loan Processing**.

Disbursements Region

Borrower Interest Indicator: If borrowers intend to pay interest on loans from this Lender ID while in school, select this check box.

Hold Indicator: Select this check box to indicate that lenders should hold the disbursement of funds until notified by your institution.

EFT Authorization: Select this check box to permit the lender to electronically send the funds to your institution based on the student's authorization.

Automatic Fund Late Disbursements: Select this check box to accept funds that are coded as late disbursement from the lender.

One setup record: There can be only one setup record per year.

26.7 Direct Loan Setup

Set up direct loan setup.

26.7.1 Setting Up Direct Loan Setup IGFSL003

Maintain details of the Federal Direct Loan. This includes origination fee, promissory note, and disbursement details. The Federal direct loan program provides students with the ability to borrow directly from the U.S. Department of Education.

The following loans are processed under federal direct loans:

- Federal Direct Stafford Subsidized Loans
- Federal Direct Stafford Unsubsidized Loans
- Federal Direct PLUS loans

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Award years are set up.

Navigation

Financial Aid > Setup > Loan Processing > Direct Loan Setup > Direct Loan Setup

Additional Notes and Business Rules

Direct loan school code: Create the direct loan school code as an alternate id type and assign it to the appropriate institution or organizational unit.

26.8 Stafford Loans

Set up limits for federal stafford loans for an award year based on the grade level and dependency status for individual students.

26.8.1 Setting Up Federal Stafford Loan Limits IGFAW021

Enter the annual stafford loan limits that are determined by need, cost of attendance, other financial aid received, student dependency status, and grade level. The total aggregate limits for federal stafford loans are determined by dependency status and grade level.

Loan limits are used by the awarding processes to limit the amount of loans a student can be awarded based on dependency status and grade level.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Calendar types are set up.

Award year are set up.

Navigation

Financial Aid > Setup > Loan Processing > Federal Stafford Loan Limits > Federal Stafford Loan Limits

26.8.2 Setting Up Financial Aid Grade Level Mapping IGFAW033

Map class standing defined in Oracle Student System to the Financial Aid grade level codes used for loan origination.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Class standing is set up.

Award years are set up.

Navigation

Financial Aid > Setup > Application Processing > Enrollment Mappings > Financial Aid Grade Level Mapping > Financial Aid Grade Level Mapping

Additional Notes and Business Rules

Award Year: Depending on the award year selected, the **Effective Dates** field is automatically populated.

26.9 Award Processing

You can define fund characteristics that are used to determine how financial aid funds are awarded to students. Fund characteristics can be modified from award year to award year.

26.9.1 Setting Up Fund Type IGFAW008

Fund types identify user-defined fund types which can be used for reporting purposes. You may want to create your own classifications of financial aid funds in order to query information about these funds in a particular way. For example, North University can set up **Grants, Loan, Work, and Scholarships** as its fund types. South University can set up **Grants, Loan, Work, SU Scholarships, and Outside Scholarships** as its fund types because they choose to differentiate their scholarships.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Type

26.9.2 Setting Up Fund Codes IGFAW009

Create fund codes by mapping a user-defined fund type, system fund code, system fund type, and fund source to the fund.

Prerequisites

Fund types are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Code > Fund Code

Additional Notes and Business Rules

System Fund Code: Enter a system fund code to be associated with the user-defined fund code. Only one fund can be mapped to a system fund code, with the exception of **General Fund** and **External Fund**, and **Work Study**. Work Study can have any number of funds mapped to it, but only one fund can have the fund source set to **Federal**. Based on this field, Oracle Student System identifies the following funds, and processes them:

- Alternative Loan
- Direct Loan PLUS
- Direct Loan Subsidized
- Direct Loan Unsubsidized
- External Fund
- FFELP PLUS
- FFELP Subsidized
- FFELP Unsubsidized
- Federal Supplemental Educational Opportunity Grant
- General Fund
- Pell Grant
- Perkins Loan
- Sponsorship
- Work Study

Active: If selected, then user-defined fund code is available for processing.

26.9.3 Setting Up Fund Manager IGFAW010

Set fund properties and maintain fund information. Only users with appropriate access rights can manage fund information. Fund management is a set of activities and processes that define fund sources and create financial aid award packages for students.

A financial aid award package is made up of one or more funds where each fund has a set of conditions that governs the criteria for allocating funds. The associated attributes that define how the fund can be used include the following: amount available to award students, rules governing the disbursement of funds, and summary information used to create reports.

You can define packaging constraints, disbursement creation information, and Award Notice text for the fund. Enter details of the fund disbursement and specify pays only fee classes, pays only programs, pays only units and to do items.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Note: While creating a Fund ID for any Direct Loan or FFELP Loan in the Fund Manager window, you must set the **Round Off Factor** field to a value other than **No Rounding Off** or **Round Off to the Nearest 50 cents**.

Prerequisites

Date aliases are set up.

Financial aid attendance types are set up.

Fee types are set up.

Credit types are set up.

To Do items are set up.

Basic program details are set up.

Basic unit details are set up.

Load calendars are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager

Additional Notes and Business Rules

Summary tab:

- **Authorized Amount:** Enter the total authorized amount available for named fund in named award year.
- **Exceed By Amount:** Enter the amount by which given authorized amount can be exceeded.

- **Exceed By%:** Enter the percentage of authorized amount allowed in excess of authorized amount

Summary Totals Region:

- **Offered Amount:** Total amount of authorized amount actually offered in given award year.
- **Offered Award Count:** Total number of awards offered in given award year from given fund.
- **Accepted Amount:** Total amount of offered amount accepted in given award year.
- **Accepted Award Count:** Total number of offered awards accepted in given award year from given fund.
- **Declined Amount:** Total amount of offered amount declined in given award year.
- **Declined Award Count:** Total number of offered awards declined in given award year from given fund.
- **Canceled Amount:** Total amount of authorized amount cancelled in given award year.
- **Canceled Award Count:** Total number of authorized awards cancelled in given award year from given fund.
- **Disbursed Amount:** Total amount of accepted amount disbursed in given award year.
- **Disbursed Award Count:** Total number of accepted awards disbursed in given award year from given fund.
- **Remaining to Disburse:** Number of accepted awards left to be disbursed for given award year and fund.
- **Remaining to Award:** Total number of offered awards not accepted or declined that remains to be awarded.

Packaging tab:

- **Min Award Amount:** Enter the minimum amount to be awarded when an automated packaging process is run.
- **Max Award Amount:** Enter the maximum amount that can be awarded when an automated packaging process is run.

- **Max Yearly Amount:** Enter the maximum amount that can be awarded in a given award year.
- **Lifetime Max Amount:** Enter the maximum award a student can receive from this fund over the course of his or her attendance at your institution.
- **Award Expiration Offset:** Enter the date alias for the duration after which the award is canceled if not accepted.
- **Initial Award Status:** Enter the award status to be used when the fund is awarded.
- **Needs Analysis Methodology:** Indicate whether the Federal Methodology or Institutional Methodology is used to award the fund. Institutional Methodology is not an option in the list of values for funds with a source of **Federal**. Institutional Methodology is not an option in the list of values if the IGS: INAS Integrated profile option is set to **No**.
- **Round Off Factor:** Enter the round off factor for the award sum.
- **Lifetime Max Terms:** Enter the maximum number of terms a student may receive this fund at your institution.
- **Min Disbursements:** Enter the minimum number of disbursements.
- **Max Disbursements:** Enter the maximum number of disbursements.
- **Print Award Letter:** If selected, then fund appears on award letter correspondence.
- **Replace Family Contribution:** If selected, then fund can replace student's family contribution. This check box is disabled for institutional methodology funds.
- **Entitlement:** If selected, then this fund is awarded irrespective of the need.
- **Update Need:** If selected, then the need by the amount awarded is reduced.
- **Manual Packaging:** If selected, then funds are allowed to be awarded manually.
- **Self Help:** If selected, then this fund is of the type Self Help.
- **Gift Aid:** If selected, then this fund is of type Gift Aid.
- **Auto Packaging:** If selected, then fund can be used in automatic award packaging process.
- **Exceed Authorized Funds:** If selected, then packaging process takes into account the amount or percentage specified as Exceed By on Summary

- **Award Text:** Opens Editor window for users to enter fund description text for Award Letter correspondence

Disbursements tab:

- **Fee Type:** When a disbursement is reduced or cancelled, charge is created against this fee type in student finance.
- **Credit Type:** Disbursement is credited into this credit type in student finance.
- **No NSLDS History Disbursement Date Offset:** Enter the date for delayed disbursement of first time Federal Stafford Loan borrowers (those with no NSLDS loan history).
- **Disbursement Expiration Offset:** Enter the date by which planned disbursements are cancelled.
- **Verification Enforcement Date Offset:** Enter the offset date alias for verification of actual disbursement against enrollment and pays only validations.
- **Disbursement Record Required:** If selected, then external agency's disbursement record must exist.
- **Promissory Note Required:** If selected, then promissory note status must be signed for disbursement.
- **Origination Record Required:** If selected, then external agency's origination record must exist.
- **Receipt of Funds Required:** If selected, then disbursement can take place only if the funds are received by your institution.
- **Disburse to Student Account:** If selected, then fund can be disbursed to the student account.
- **Include as Planned Credit:** If selected, then planned disbursements can reduce the balance owed on the student account.
- **Ignore Verification and Application Process Statuses:** If selected, then a fund can be disbursed despite the validations for **Verification** and **Application Process** statuses.
- **Allow First Disbursement to Non Verified Student:** If selected, then first disbursements of funds can be made to students who do not have terminal verification statuses. A terminal verification status is any status that indicates the end of the verification process or that a student has not been selected for verification.

- **Pays Only Fee Classes:** You can restrict disbursement of this fund by fee class.
- **To Do Items:** Specify To Do items to be added when this fund is awarded.
- **Pays Only Programs:** You can restrict disbursement of this fund by program participation.
- **Pays Only Units:** You can restrict disbursement of this fund by unit participation.

Student Employment tab:

- **Government Share%:** Enter the government share percentage of wage. This indicates how much of student wage will be subsidized by the government when awarded this work fund.
- **Employer Share%:** Enter the employer share percentage of wage. This indicates how much of student wage will be paid by the employer when awarded this work fund.
- **Salary Based:** If selected, then payment is salary-based instead of hourly-based.
- **%:** Either this field or a value must be specified when the specified percentage of the fund is used and a notification is sent out.
- **Value:** Either this field or a percentage must be specified when the specified value is used and a notification is sent out

Relative Funds tab:

- **Exclusive Funds:** Enter fund codes for funds that, if already existing for a student, will prevent this fund from being awarded to a student.
- **Contingent Funds:** Enter fund codes that must exist as an award for a student for this fund to be awarded to a student.

26.9.4 Setting Up Pays Only Fee Classes IGFAW042

Specify the fee classes that can be paid from a particular fund. A specified fund can only be used to pay for only these fee classes. Fee classes are defined in student finance.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Fee types are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager > Pays Only
Fee Classes > Pays Only Fee Classes

26.9.5 Setting Up To Do Items IGFAW043

Specify the To Do items to be assigned when an award is made from the fund.
Specify also which To Do items must be in **Complete** status before the award is
disbursed.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Basis unit details are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager > To Do Items
> To Do Items

26.9.6 Setting Up Pays Only Programs IGFAW040

Specify the academic programs that can be paid from a particular fund. A specified
fund can only be used to pay for only these programs.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Basic program details are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager > Pays Only
Programs > Pays Only Programs

26.9.7 Setting Up Pays Only Units IGFAW041

Specify the academic program units that can be paid from a particular fund. A
specified fund can only be used to pay for only these program units.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Basis unit details are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager > Pays Only Units > Pays Only Units

26.9.8 Setting Up Award Revision Reasons IGFAW024

Set up various reasons to be used when an award is modified. When you manually correct a disbursement, you can set a revision code against the correction record stating the reason for revising the disbursement.

Navigation

Financial Aid > Setup > Award Processing > Award Packaging > Award Revision Reasons

Additional Notes and Business Rules

Active: If selected, indicates that the award revision reason can be used.

26.9.9 Setting Up Fund Term Installments IGFAW026

Distribute funds across various teaching periods within terms in the award year.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Manager > Fund Term Installments

Additional Notes and Business Rules

Teaching Period: Code of teaching period or periods within named term over which named fund is to be distributed for disbursement to applicant.

Disbursement Date Offset: Date alias for disbursement offset.

26.9.10 Setting Up Fund Calendar Relations IGFAW018

Link calendar instances with each other. The award calendar and all load and teaching calendars must be mapped to successfully roll forward the fund manager attributes.

Complete this setup before running the rollover concurrent process.

Prerequisites

Calendar types are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Fund Calendar Relations

Additional Notes and Business Rules

Calendar: Enter the calendar instances such as term or teaching period that you want to be rolled over from the current year to the succeeding year. This information is used during Fund Rollover Process concurrent process. When a fund is rolled over, the concurrent process picks each term and teaching period for the specified fund and searches for the succeeding year's term or teaching period that you select in this window. You can map two calendar instances in the current year to one calendar instance in the succeeding year.

26.10 Satisfactory Academic Progress

Satisfactory academic progress is set up in the Progression subsystem after you have set up funds. You can place holds on students to stop all fund awarding or disbursement or awarding and disbursement of selected funds. Different progression rules for different funds can be created as needed.

Use the windows below to set up satisfactory academic progress rules:

26.10.1 Student Statistic Types IGSPR018

You can define a student statistic type for financial aid to be used when assessing satisfactory academic progress and attached Oracle Student System statistical elements to it. These elements are attempted credit points, earned credit points, grade point average, GPA credit points, and GPA quality points.

26.10.2 Person Hold Types IGSEN042

You can define hold types to be used when assessing satisfactory academic progress and attach system hold type effects to them. These effects are exclude all funds from awarding, exclude all funds from disbursement, exclude specific funds from awarding, exclude specific funds from disbursement.

26.10.3 Progression Outcome Types IGSPR008

You can define progression rule outcome types to be used when defining progression rules and attach a system progression rule outcome type of exclude from awarding fund / disbursement fund and hold type effect to them.

26.10.4 Progression Rule Categories IGSPR001

You can define progression rule categories to determine which system progression rules to use.

26.10.5 Progression Rules IGSPR006

You can define progression rules for rule categories.

26.11 Cost of Attendance

Cost of attendance (COA) is made up of many items such as tuition, fees, room, board, books, travel, and miscellaneous costs. You can define COA items and associate and define distribution of costs of these items using COA groups. You can choose to group items that are to be assigned to like groups of students. A COA group can represent all of the items needed for a student's cost of attendance or fewer items, allowing combining of COA groups to build a student's cost of attendance.

26.11.1 Setting Up Cost of Attendance Lookups

Define cost of attendance lookups.

Navigation

Setups > Lookups

Query the lookup type.

Additional Notes and Business Rules

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

- IGF_AW_COA_ITEM_CATEGORY

26.11.2 Setting Up Cost of Attendance Items IGFAW002

Define multiple items associated with a variable cost. You can create different cost of attendance items for the tuition of residents and nonresidents and for full or part time students.

Map cost of attendance items to an item category. You can add values to the Item Category list of values by adding values to the IGF_AW_COA_ITEM_CATEOGRY lookup.

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Items

Additional Notes and Business Rules

Item Category: An item category can be used more than once. An item must be mapped to an item category. After an item category is mapped to an item, it cannot be changed if the cost of attendance item is used.

For each cost of attendance item, select or deselect the **Active** check box to indicate if the item can be used when creating cost of attendance groups.

26.11.3 Setting Up Cost of Attendance Groups IGFAW005

Define, group, and distribute COA items.

Items are assigned and distributed across terms using the Awards - Cost of Attendance Item Assignment concurrent process and the Cost of Attendance Groups window.

This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Prerequisites

Cost of attendance items are set up.

Award years are set up.

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Groups

Additional Notes and Business Rules

Group Code: Enter a user-defined identifier to which COA items are mapped. At least one item is required to save the record.

Pell Amount: Enter a user-defined 9 month Pell amount for the Cost of Attendance Item.

Pell Alternate Expenses: Enter a user-defined 9 month Pell Alternate Expenses amount.

Fixed: If selected, then item is fixed (direct) cost of attendance item. When setting up award groups, you can choose to award only against fixed (direct) costs

Item Distribution: Oracle Student System selects this check box when an item distribution is saved in the Item Distribution window that differs from the group distribution.

Term: At least one term is required to be able to save a record. Additional terms are optional.

Percentage: Percentage is required for the required term. Percentage is also required for any additional terms that are created. All terms together must add up to 100%.

26.11.4 Setting Up Item Distribution IGFAW030

The distribution of the cost of attendance across the terms is applicable to all of the items. However, for a particular item, the distribution across terms can be changed such that the percentages specified in this window override those set at the group level for that item.

Distribution allows you to reflect when a student truly incurs costs. For example, if book and supply costs are greater in one term than the next, this can be reflected by distributing a larger part of the cost to the appropriate term.

Prerequisites

Cost of attendance groups are set up.

Navigation

Financial Aid > Setup > Award Processing > Cost of Attendance > Cost of Attendance Groups > Item Distribution > Distribution Override > Item Distribution

26.12 Award Packaging

Award packaging requires setting up award groups, which includes defining award limits and packaging sequences.

26.12.1 Setting Up Award Groups IGAFAW011

Define the upper level constraints of a student's financial package. For example, you can specify that incoming freshmen cannot receive more than 60% in grant assistance or the maximum grant assistance from all grant funds cannot exceed \$5,000.

Award groups set overall packaging constraints on each group of students. Schools can set these high-level constraints based on several variables and to set them either as a percentage or a fixed dollar amount. In addition, schools can set a gap amount or percentage for a group of students. This is essentially an unmet need amount applied before any aid is awarded. The policy also specifies the total amount of package aid that a student can receive.

You can also link award groups and specific funds in the Fund Sequence tab to distribution plans. When the Awards – Award Students Process concurrent process is run, the distribution plans for the award group (and funds in sequence if overridden) are used to determine the terms and percentage splits for allocating funds to students.

Navigation

Financial Aid > Setup > Award Processing > Award Packaging > Award Groups

Additional Notes and Business Rules

View-only: This window is view-only for award year statuses of **Legacy Details** or **Closed**.

Distribution Plan: Choose the award distribution plan.

Awarding limits: Awarding limits (formerly known as policies) and fund sequences are tied directly to award groups, which are tied directly to an award year.

Gift aid: Grants and scholarships map to and are mutually exclusive with gift aid. If you select to limit by gift aid, you cannot separately choose **Grants** or **Scholarships**.

Self help aid: Loans and work aid map to and are mutually exclusive with self help aid. If you select to limit by self help aid, you cannot separately choose Loans or Work Aid.

Gap amount: Gap amount is the initial amount added to the EFC to decrease a student's need. Gap amount is not packaged. The maximum package is the cost of attendance minus gap amount.

Need analysis elements: Need analysis elements are used to limit award amounts using either fixed amounts or percentages of cost of attendance, expected family contribution (EFC), gross need, and net need.

Maximum Aid: Enter the maximum amount of aid that can be awarded in this group.

Fixed costs: You can specify if only fixed (direct) costs amounts can be used for awarding.

Fund Sequence tab: Enter the funds in sequence in which they should be awarded. You can override the Max and Min amounts defaulted from the Fund Manager setup. You can also further filter recipients of each fund by specifying an additional person ID group as a filter. You can also choose another distribution plan at the fund level to be used instead of the distribution plan for the group.

Filtering funds: You can filter fund level capabilities of student populations during the Award Process. You can do this by defining a Person ID Group for each fund on the Award Groups window. The Students that are contained in both the fund Person ID group and the Award Group receive the specially filtered funds.

Updateable: The **Distribution Plan** and **Distribution Plan Override** fields are always updateable.

26.13 Rollover Financial Aid Calendars

You can roll over yearly setup that is similar from one year to the next. You can map calendars between award years to rollover fund manager setup.

26.13.1 Setting Up Fund Rollover Process IGFAW019

Rollover funds from one award year to the successive award year. The disbursement schedule for the new fund is created based on the calendar rollover information that is entered in the fund calendar rollover relationships.

Prerequisites

Calendar types are set up.

Fund calendar relations are set up.

Navigation

Financial Aid > Setup > Award Processing > Funds > Rollover Fund Attributes > Rollover Fund Attributes

Additional Notes and Business Rules

Rolling over funds: Rolling over fund attributes is performed at the award year level. Rolling over fund attributes can be performed only once. In case any fund fails the rollover for some reason, then these funds have to be rolled over individually per the Fund Rollover Concurrent Procedure.

26.14 Setting Up SAR Items IGFS006

Use this window to map SAR fields.

Prerequisites

Calendar types are set up.

Fund calendar relations are set up.

26.15 Setting Up Award Distribution Plans IGFAW046

Distribution plan setup allows you to define as many ways as you need to distribute awards over terms. You can use three multiple distribution plans in automatic awarding by selecting which plan to associate to a fund or group of funds (as part of an award group) or in manual awarding. The setup includes the selection of distribution method and terms over which to distribute a fund. Minimum attendance type or credit hour requirements can also be defined as part of a distribution plan.

Prerequisites

Date aliases are set up.

Financial aid attendance types are set up.

Load calendars are set up.

Navigation

Financial Aid > Setup > Award Processing > Award Distribution Plans

Additional Notes and Business Rules

(Distribution) Plan Code: Enter an alphanumeric code to create a unique distribution plan code

(Distribution Plan) Method: Enter the percentage split options for the distribution plan. The method selected impacts the fund amounts allocated to each term and teaching period. If **Even Split** or **Match COA Split** is selected, then the **Fund%** field for terms is disabled.

Active: If selected, then distribution plan is **Active** and can be used in processing.

(Terms) Fund%: Enter the percentage of fund dollars to be allocated for the term. The total percent for all terms must add up to 100% This field is enabled only if Manual Split is selected for Method.

Updateable: You can update all fields on the Award Distribution Plan window until the plan is associated with an award group or used in awarding (manual or automatic).

Term Disbursements window:

- **(Teaching Periods) Fund%:** Enter the percentage of fund dollars to be allocated for the teaching period. The total percent for all teaching periods in the term must add up to 100%
- **Cumulative Credit Points:** Enter a cumulative credit point amount to be used as an eligibility requirement for disbursing the fund.
- **Min Attendance Type:** Select a minimum attendance type to be used as an eligibility requirement for disbursing the fund.

26.16 Setting up Federal Alternate ID Types

You can create multiple identifiers for Financial Aid processing and reporting in the organizational unit setup in Oracle Student System by using alternate ID types. Several Alternate ID type values relevant to Financial Aid processing are seeded. These are:

- Campus Based Serial Number
- College Entrance Examination Board Code
- Direct Loan School Code
- ETI Destination Number / TG Number
- Federal School Code

- OPE Identification Number
- Pell Identification Number
- School Non Educational Branch Identifier

When you create organizational units in the Organizational Structure Data Setup window, you can assign these alternate ID types to organizational units. You are allowed to assign different identifiers to different organizational units. This facilitates institutions with multiple campuses or reporting entities for the same financial aid program. For example, you can have two Pell Identification Numbers for two separate campuses.

Additional Notes and Business Rules

Alternate ID types: Alternate ID types that are specifically assigned to your institution by the Department of Education can be assigned only to the organizational unit that represents your institution. For example, if your institution fills out one FISAP, then the main OPE ID number (with the last two digits of 00) must be assigned to your institution's organizational unit to be able to roll up of the branch OPE ID numbers to the main OPE ID number.

Inheritance: You must set up all IDs for the lowest levels of your institution. A child organization does not inherit the alternate IDs for the parent organization.

Non - US Department of Education Identifiers: If your institution is required to set up values for a non US Department of Education Identifier (for example, State Agency ID), you can create an alternate ID type with a system ID type of **Others** in the Organizational Structure Data Setup window.

RECOMMENDATION: If there are alternate ID types that are different for the parent and the children, then these identifiers should be assigned to the specific organizational unit. The main campus OPE ID number or Federal School Code should be assigned to the parent organizational unit. Branch campus OPE ID numbers or Federal School Codes should be assigned to the children organizational units.

27.1 Higher Education Statistics Agency Overview

All United Kingdom higher education institutions are required to submit student based statistical returns to the Higher Education Statistical Agency (HESA). Oracle Student System supports the production of the individualized student returns and the destination of leavers return. You can capture the data required and generate the HESA return files in the format required by HESA.

You can:

- Define Oracle Student System code sets
- Define and maintain mapping between Oracle Student System codes and HESA codes
- Capture student- and program-based information for HESA
- Calculate student full-time equivalence
- Define user return classes based on provided system return classes
- Define, generate, and maintain HESA returns
- Export HESA data from the UCAS interface to Oracle Student System
- Produce files for submission to HESA

HESA functionality is enabled by setting IGS: Country Code profile option to **United Kingdom**.

Year of Program functionality is enabled by setting IGS: Career Model Enabled profile option to **No**.

Before you can produce a HESA return, you must do the following:

- Define HESA reference codes

- Common to all institutions
- Specific to English Institutions
- Specific to Welsh Institutions
- Specific to Northern Irish Institutions
- Specific to the Destination of Leavers return
- Specific to Scottish Institutions
- Map UCAS, Oracle Student System, and HESA Reference Data
- HESA Combined and Student Return Fields 76 PGCEBJ and 77 PGCECLSS
- HESA Combined and Student Return Field 66 FEEELIG
- HESA Combined and Student Return Field 31 TTACCOM
- HESA Combined and Student Return Field 6 FTE
- HESA Combined and Student Return Field 65 FUNDCODE
- HESA Combined and Student Return Field 68 MSTUFEE
- Identify Highest Qualification on Entry Grading Schema

27.2 Maintain Codes

HESA data is collected about programs, year of programs, units, students, student program attempts, student year of programs, and student unit enrollments throughout Oracle Student System.

Some of this data is collected in the core student system using Oracle Student System lookups, and some is collected in HESA specific windows using the Oracle Student system HESA reference codes. HESA has pre-defined values to be returned for the various fields comprising a return. Therefore the Oracle Student System lookup codes and Oracle Student System HESA reference codes need to be mapped to the HESA defined codes. When the HESA extraction concurrent process is run, the Oracle Student System reference codes are mapped to the HESA field codes.

27.2.1 Maintaining Codes IGSHE001

The HESA field codes are defined and maintained in Oracle Student System using the HESA Maintain Codes window. The HESA Maintain Codes window is also used to define Oracle Student System reference codes for HESA specific data which is not captured in the core system.

Navigation

HESA Returns > HESA Setup > Maintain Codes

Additional Notes

Display Title: This field is the short title for code when used as mapping source in Maintain Code Mappings window.

Closed: If a code is marked as closed, then it cannot be used to define a new mapping and cannot be used on the HESA data collection forms.

27.3 Maintain Code Associations

Maintain HESA code associations.

27.3.1 Maintain Code Associations IGSHE002

This window displays seeded associations between Oracle Student System and HESA code sets used during HESA return generation and the Import Data from UCAS concurrent process.

HESA requires that the classification of the first degree is returned for Postgraduate Certificate of Education (PGCE) students. To derive this information, the HESA return generation process needs to know which awards held in Oracle Student System can be awarded as first degrees. This is done by defining the code **OSS_QUAL_1ST_DEGREE** in the HESA Maintain Codes window. Each Oracle Student System award awarded as a first degree should be added to this code set.

Navigation

HESA Returns > HESA Setup > Maintain Code Associations

Additional Notes and Business Rules

Association Code: Enter the code name related to HESA or UCAS code mapping.

Sequence: Enter the sequence number within code association. This determines order of data entry in Maintain Code Mapping window.

Main Source: This field displays the database table from which fields in Maintain Code Mapping window are derived.

Secondary Source: This field derives the fields in Maintain Code Mapping window.

Condition: This field displays the extra condition that must be added to obtain correct values from database table and column.

27.4 Maintain Code Mappings

HESA requires that the data returned to them is reported using valid HESA codes so the Oracle Student System lookup codes and the HESA subsystem reference codes need to be mapped to the HESA defined field values. In addition, when deriving some fields there may be a direct mapping between two HESA field codes that should be considered.

For example, if a student has a HESA Special Student (field 28) codes 3 the major source of tuition fees MSTUFEE (field 68) should be coded 98. These mappings are maintained using the HESA Maintain Code Mappings window.

27.4.1 Maintaining Code Mappings IGSHE003

HESA field codes are mapped to Oracle Student System codes using the HESA Maintain Code Mappings window. A code association is defined for each code mapping required.

Navigation

HESA Returns > HESA Setup > Maintain Code Mappings

Additional Notes

Seeded code associations: The fields in this window are derived from the seeded code associations. The code associations are provided as seed data and cannot be amended. To view the code association details, see Maintain Code Associations IGSHE002.

Titles: The titles of the fields enabled for data entry are replaced with the display titles associated with the selected code association. The field titles indicate the type of code required, and the lists of values contain the valid codes available.

Values: Values can only be entered in columns where the headings map1, map2, map3 have been replaced by the display title.

27.5 Codes and Mappings

Some fields are common to all institutions and some fields only apply to particular types of institutions and some fields only apply to the destination of leavers return.

The following sections define the codes and mappings and associated prerequisites that must be set up by different types of institutions and to produce the destination of leavers return.

27.5.1 Common to All Institutions

The following table describes HESA codes and code mappings that must be defined by all institutions.

Table 27–1 All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_CAMPUS	HESA Campus	OSS_HESA_LOC_CAMP_ASSOC	Location to HESA Campus	Locations IGSOR031
HESA_CLASS	HESA Classification Codes	OSS_HESA_CLASS_ASSOC	Award grading schema and grade to HESA classification value	Grading Schema IGSAS025
HESA_COSTCN	HESA Cost Centre	OSS_HESA_COSTCN_ASSOC	Cost Centre Student System to HESA Codes	OSS_COSTCN
HESA_CRDTSCM	HESA Credit Transfer Scheme	OSS_HESA_CRDSTCM_ASSOC	Credit Transfer Scheme Student System to HESA Codes	OSS_CRDTSCM
HESA_DIS_ALLOW	HESA Disability Allowance	OSS_HESA_DIS_ALLOW_ASSOC	Disability Allowance Student System to HESA Codes	OSS_DIS_ALLOW
HESA_FEEBAND	HESA Fee Band	OSS_HESA_FEEBAND_ASSOC	Fee Band Student System to HESA Codes	OSS_FEEBAND

Table 27–1 (Cont.) All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_FEEELIG	HESA Fee Eligibility	OSS_HESA_FEEELIG_ASSOC	Fee Eligibility Student System to HESA Codes	OSS_FEEELIG
HESA_FRAN_ACT	HESA Franchising Activity	OSS_HESA_FRAN_ASSOC	Franchising Activity Student System to HESA Codes	OSS_FRAN_ACT
HESA_FUND_CODE	HESA Fundability Code	OSS_HESA_FUND_CODE_ASSOC	Fundability Code Student System to HESA Codes	OSS_FUND_CODE
HESA_HEENT	HESA New Entrant to HE Indicator	OSS_HESA_HEENT_ASSOC	New Entrant to HE Indicator Student System to HESA Codes	OSS_HEENT
HESA_LEVLCRD	HESA Level of Credit	OSS_HESA_LEVLCRD_ASSOC	Unit Level to HESA Level of Credit	Unit Level IGSPS04
HESA_LOCSDY	HESA Location of Study	OSS_HESA_LOCSDY_ASSOC	Location of Study Student System to HESA Codes	OSS_LOCSDY
HESA_MODE	HESA Mode of Study	OSS_HESA_MODE_ASSOC	Attendance Type to HESA Mode of Study Codes	OSS_MODE_TYPE
HESA_MSTUFEE	HESA Major Source of Tuition	OSS_HESA_MSTUFEE_ASSOC	Major Source of Tuition Fees Student System to HESA Codes	OSS_MSTUFEE

Table 27–1 (Cont.) All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_NHS_EMPLOYER	HESA NHS Employer	OSS_HESA_NHS_EMPLOY_ASSOC	NHS Employer Student System to HESA Codes	OSS_NHS_EMPLOYER
HESA_NHS_FUSRC	HESA NHS Funding Source	OSS_HESA_NHS_FUND_ASSOC	NHS Funding Source Student System to HESA Codes	OSS_NHS_FUSRC
HESA_PROPORTION	HESA Qualification Aim Proportion	OSS_HESA_PROPORTION_ASSOC	Qualification Aim Proportion Student System to HESA Codes	OSS_PROPORTION
HESA_QUALAIM	HESA Qualification Aim	OSS_HESA_AWD_ASSOC	Program Award and Student Program Attempt to HESA Qualification Aim code	Awards for Qualification aim and obtained IGSPS008
HESA_REG_BODY	HESA Department of Health Regulatory Body	OSS_HESA_REG_BODY_ASSOC	Program Reference Code - REGBODY to HESA Department of Health Regulatory Body	Reference Code Types IGSPS011 reference code types REGBODY
HESA_RSNLEAVE	HESA Reason for Leaving	OSS_HESA_RSNLEAVE_ASSOC	Discontinuation Reason to HESA Reason for Leaving	Discontinuation Reason IGSEN017

Table 27–1 (Cont.) All Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_SPEC_STUD	HESA Special Student Indicator	OSS_HESA_SPEC_STUD_ASSOC	Special Student Indicator Student System to HESA Codes	OSS_SPEC_STUD
HESA_TTA	HESA Term Time Accommodation	OSS_HESA_TTA_ASSOC	Term Time Accommodation Student System to HESA Codes	OSS_TTA
HESA_TTCID	HESA Teacher Training Course Identifier	OSS_HESA_TTCID_ASSOC	Teacher Training Course Identifier Student System to HESA Codes	OSS_TTCID
HESA_TYPEYR	HESA Type of Program Year	OSS_HESA_TYPEYR_ASSOC	Type of Program Year Student System to HESA Codes	OSS_TYPEYR
HESA_UFI_PLACE	HESA UFI Plac	OSS_HESA_UFI_ASSOC	UFI Place Student System to HESA Codes	OSS_UFI_PLACE

27.5.2 Specific to All English Institutions

The following table describes HESA codes and code mappings that should be defined by all English institutions.

Table 27-2 All English Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ FESTUMK	HESA FE Student Marker	OSS_HESA_ FESTUMK_ ASSOC	FE Student Marker Student System to HESA	OSS_FESTUMK
HESA_ FUNDCOMP	HESA completion of year of program	OSS_HESA_ FUNDCOMP_ ASSOC	Completion of year of program Student System to HESA codes	OSS_FUNDCOMP
HESA_PRG_ OUT	HESA completion of year of program	OSS_HESA_ PROG_ OUCOME_ ASSOC	Progression Outcome to HESA Program Completion	IGS lookups - lookup type progression status
HESA_ FEPRMK	HESA FE Program Marker	OSS_HESA_ FEPRMK_ ASSOC	FE program marker, Student System to HESA	OSS_FEPRMK
HESA_ FUNDLEV	HESA Level Applicable to Funding Council	OSS_HESA_ FUNDLEV_ ASSOC	Level Applicable to Funding Council Student System to HESA codes	OSS_FUNDLEV

27.5.3 Specific to English Institutions Reporting FE Students

The following table describes HESA codes and code mappings that should be defined by English institutions reporting FE students.

Table 27–3 English Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_SUP_BAND	HESA Additional Support Band	OSS_HESA_SUP_BAND_ASSOC	Additional Support Band Student System to HESA	OSS_SUP_BAND
HESA_CSTAT	HESA Completion Status	OSS_HESA_CSTAT_ASSOC	Completion Status Student System to HESA codes	OSS_CSTAT
HESA_PROGRESS	HESA Good Standing Marker	OSS_HESA_PROGRESS_ASSOC	Good Standing Marker Student System to HESA codes	OSS_PROGRESS
HESA_FEQAIM	HESA FE Qualification Aim	OSS_HESA_FEQAIM_ASSOC	Program Award to HESA FE Qualification Aim	Awards IGSPS08
HESA_VLEVEL	HESA Vocational Level of Course	OSS_HESA_VLEVEL_ASSOC	Program Reference Type VOCATIONAL to HESA Vocational level of course	Reference Code Types IGSPS011 reference code types VOCATIONAL
HESA_NONPAY	HESA Reason for Non Payment of Fees	OSS_HESA_NONPAY_ASSOC	Reason for Non Payment of Fees Student System to HESA codes	OSS_NONPAY

27.5.4 Specific to English Institutions Reporting Teacher Training Students

The following table describes HESA codes and code mappings that should be defined by English institutions reporting teacher training students.

Table 27–4 English Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ITTPHSC	HESA ITT phase/scope	OSS_HESA_ITTPHSC_ASSOC	ITT phase/scope Student System to HESA codes	OSS_ITTPHSC
HESA_OUTCOME	HESA ITT Outcome	OSS_HESA_OUTCOME_ASSOC	ITT Outcome Student System to HESA Codes	OSS_OUTCOME

27.5.5 Specific to Welsh Institutions

The following table describes HESA codes and code mappings that should be defined by all Welsh institutions.

Table 27–5 All Welsh Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_FESTUMK	HESA FE Student Marker	OSS_HESA_FESTUMK_ASSOC	FE Student Marker Student System to HESA	OSS_FESTUMK
HESA_FUNDCOMP	HESA completion of year of program	OSS_HESA_FUNDCOMP_ASSOC	Completion of year of program Student System to HESA codes	OSS_FUNDCOMP

Table 27–5 (Cont.) All Welsh Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_PRG_OUT	HESA completion of year of program	OSS_HESA_PROG_OUCOME_ASSOC	Progression Outcome to HESA Program Completion	IGS lookups - lookup type progression status
HESA_FEPRMK	HESA FE Program Marker	OSS_HESA_FEPRMK_ASSOC	FE program marker, Student System to HESA	OSS_FEPRMK

27.5.6 Specific to Welsh Institutions Reporting FE Students

The following table describes HESA codes and code mappings that should be defined by Welsh institutions reporting FE students.

Table 27–6 Welsh Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ST13	HESA SLDD - Discrete provision	OSS_HESA_ST13_ASSOC	SLDD Discrete Provision, Student System to HESA codes	OSS_ST13
HESA_CSTAT	HESA Completion Status	OSS_HESA_CSTAT_ASSOC	Completion Status Student System to HESA codes	OSS_CSTAT
HESA_PROGRESS	HESA Good Standing Marker	OSS_HESA_PROGRESS_ASSOC	Good Standing Marker Student System to HESA codes	OSS_PROGRESS

Table 27–6 (Cont.) Welsh Institutions Reporting FE Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_FEQAIM	HESA FE Qualification Aim	OSS_HESA_FEQAIM_ASSOC	Program Award to HESA FE Qualification Aim	Awards IGSPS08
HESA_VLEVEL	HESA Vocational Level of Course	OSS_HESA_VLEVEL_ASSOC	Program Reference Type VOCATIONAL to HESA Vocational level of course	Reference Code Types IGSPS011 reference code types VOCATIONAL
HESA_NONPAY	HESA Reason for Non Payment of Fees	OSS_HESA_NONPAY_ASSOC	Reason for Non Payment of Fees Student System to HESA codes	OSS_NONPAY
HESA_DEST	HESA destination values	OSS_HESA_DESTIN_ASSOC	Destination Student System to HESA codes	OSS_DEST

27.5.7 Specific to Welsh Institutions Reporting Teacher Training Students

The following table describes HESA codes and code mappings that should be defined by Welsh institutions reporting teacher training students.

Table 27–7 Welsh Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ITTPHSC	HESA ITT phase/scope	OSS_HESA_ITTDHSC_ASSOC	ITT phase / scope Student System to HESA codes	OSS_ITTPHSC

Table 27–7 (Cont.) Welsh Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_OUTCOME	HESA ITT Outcome	OSS_HESA_OUTCOME_ASSOC	ITT outcome Student System to HESA codes	OSS_OUTCOME
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM

27.5.8 Specific to Northern Irish Institutions

The following HESA codes and code mappings should be defined by all Northern Irish institutions.

Table 27–8 All Northern Irish Institutions

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_RELIG	HESA Religion	OSS_HESA_RELIG_ASSOC	Person Religion to HESA Religion	IGS lookups person religion
HESA_FUNDLEV	HESA Level Applicable to Funding Council	OSS_HESA_FUNDLEV_ASSOC	Level Applicable to Funding Council Student System to HESA codes	OSS_FUNDLEV
HESA_PRG_OUT	HESA Completion of Year of Program	OSS_HESA_FUNDCOMP_ASSOC	Completion of Year of Program Student System to HESA codes	OSS_FUNDCOMP

27.5.9 Specific to Northern Irish Institutions Reporting Teacher Training Students

The following HESA codes and code mappings should be defined by Northern Irish institutions reporting teacher training students.

Table 27–9 All Northern Irish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM
HESA_TQSEC	HESA Teaching Qualification Sought/Gained Sector	OSS_HESA_TQSEC_ASSOC	Teaching Qualification Sought/Gained Sector Student System to HESA codes	OSS_TQSEC

27.5.10 Specific to Scottish Institutions Reporting Teacher Training Students

The following HESA codes and code mappings should be defined by Scottish institutions reporting teacher training students.

Table 27–10 Scottish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_BITTM	HESA Bilingual ITT Marker	OSS_HESA_BITTM_ASSOC	Bilingual ITT Marker Student System to HESA codes	OSS_BITTM
HESA_TQSEC	HESA Teaching Qualification Sought/Gained Sector	OSS_HESA_TQSEC_ASSOC	Teaching Qualification Sought/Gained Sector Student System to HESA codes	OSS_TQSEC

Table 27–10 (Cont.) Scottish Institutions Reporting Teacher Training Students

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_TQSUB123	HESA Teacher Qualification Sought/Gained Subject	OSS_HESA_TQSUB123_ASSOC	Teaching Qualification Sought/Gained Subject Student System to HESA Codes	OSS_TQSUB123

27.5.11 Specific to the Destination of Leavers (DLHE) Return

The following table describes codes and code mappings should be defined by all institutions that use the Oracle Student System HESA solution to produce the DLHE return.

Table 27–11 DLHE Return

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_METHOD	HESA Method Of Data Collection Indicator	OSS_HESA_METHOD_ASSOC	Mapping between HESA and OSS Method Of Data Collection Indicator	OSS_METHOD
HESA_EMPCIR	HESA Employment Circumstances Indicator	OSS_HESA_EMPCIR_ASSOC	Mapping between HESA and OSS Employment Circumstances Indicator	OSS_EMPCIR
HESA_MODSTUDY	HESA Study Indicator	OSS_HESA_MODSTUDY_ASSOC	Mapping between HESA and OSS Study Indicator	OSS_MODSTUDY

Table 27–11 (Cont.) DLHE Return

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ EMPSIZE	HESA Employer Size Indicator	OSS_HESA_ EMPSIZE_ ASSOC	Mapping between HESA and OSS Employer Size Indicator	OSS_EMPSIZE
HESA_ DURATION	HESA Duration Of Employment Indicator	OSS_HESA_ DURATION_ ASSOC	Mapping between HESA and OSS Duration Of Employment Indicator	OSS_DURATION
HESA_ QUALREQ	HESA Qualification Requirement For Job Indicator	OSS_HESA_ QUALREQ_ ASSOC	Mapping between HESA and OSS Qualification Requirement For Job Indicator	OSS_QUALREQ
HESA_ EMPIMP	HESA Importance To Employer Indicator	OSS_HESA_ EMPIMP_ ASSOC	Mapping between HESA and OSS Importance To Employer Indicator	OSS_EMPIMP
HESA_ JOBFND	HESA How Found Job Indicator	OSS_HESA_ JOBFND_ ASSOC	Mapping between HESA and OSS How Found Job Indicator	OSS_JOBFND
HESA_ PREVEMP	HESA Previously Employed Indicator	OSS_HESA_ PREVEMP_ ASSOC	Mapping between HESA and OSS Previously Employed Indicator	OSS_PREVEMP

Table 27–11 (Cont.) DLHE Return

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_NATSTUDY	HESA Nature Of Study/Training Indicator	OSS_HESA_NATSTUDY_ASSOC	Mapping between HESA and OSS Nature Of Study/Training Indicator	OSS_NATSTUDY
HESA_TYPEQUAL	HESA Type Of Qualification Indicator	OSS_HESA_TYPEQUAL_ASSOC	Mapping between HESA and OSS Type Of Qualification Indicator	OSS_TYPEQUAL
HESA_SECINT1	HESA Reason For Taking Another Course Indicator	OSS_HESA_SECINT1_ASSOC	Mapping between HESA and OSS Reason For Taking Another Course Indicator	OSS_SECINT1
HESA_FUNDSTUDY	HESA How Funding Further Study Indicator	OSS_HESA_FUNDSTDY_ASSOC	Mapping between HESA and OSS How Funding Further Study Indicator	OSS_FUNDSTUDY
HESA_TEACHSCT	HESA Teaching Sector Indicator	OSS_HESA_TEACHSCT_ASSOC	Mapping between HESA and OSS Teaching Sector Indicator	OSS_TEACHSCT
HESA_TEACHPHS	HESA Teaching Phase Indicator	OSS_HESA_TEACHPHS_ASSOC	Mapping between HESA and OSS Teaching Phase Indicator	OSS_TEACHPHS

Table 27–11 (Cont.) DLHE Return

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_INTENT	HESA Reason For Taking Original Course Indicator	OSS_HESA_INTENT_ASSOC	Mapping between HESA and OSS Reason For Taking Original Course Indicator	OSS_INTENT
HESA_SIC	HESA Standard Industrial Classification	OSS_HESA_SIC_ASSOC	Mapping between HESA and OSS Standard Industrial Classification	OSS_SIC

27.6 Map UCAS, Oracle Student System, and HESA Reference Data

The applicant data imported from UCAS is coded using standard UCAS reference codes. When the data is imported to Oracle Student System and person records are created, these codes must be converted to Oracle Student System reference codes. If this data is later reported to HESA, then the Oracle Student System reference codes must also be mapped to HESA reference codes. Some UCAS data is coded, but there is no UCAS reference data provided for these codes. These codes must first be defined with the HESA reference codes using the Maintain Codes window.

The following codes must be defined:

- **UCAS_SOC**: UCAS Social Class Indicator
- **UCAS_GEN**: UCAS Gender

The following table describes UCAS codes, HESA codes, and code mappings that must be defined.

Table 27–12 UCAS and HESA Codes and Code Mappings

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_DOM	HESA Domicile	UC_OSS_HE_DOM_ASSOC	Domicile	OSS_DOM, UCAS reference data - Domicile

Table 27–12 (Cont.) UCAS and HESA Codes and Code Mappings

Codes	Description	Code Mapping	Description	Prerequisites for Mapping
HESA_ETHNICITY	HESA Ethnicity	UC_OSS_HE_ETH_ASSOC	Ethnicity	IGS Lookups - ethnicity and UCAS reference data Ethnicity
HESA_OCC	HESA Parental Occupation Codes	UC_OSS_HE_OCC_ASSOC	Occupation Codes	OSS_OCC, UCAS reference data - Occupation Codes
HESA_SOC	HESA Socio Economic Indicator	UC_OSS_HE_SOC_ASSOC	Social Class	OSS_OCC, UCAS_SOC
HESA_GENDER	HESA Gender	UC_OSS_HE_GEN_ASSOC	Gender	IGS Lookups - type Sex
HESA_NAT	HESA Nationality	UC_OSS_HE_NAT_ASSOC	Nationality	UCAS reference codes - Domicile and FND territories
HESA_DIS	HESA Disability	UC_OSS_HE_DIS_ASSOC	None	UCAS reference codes - Disability and person special needs

27.7 HESA Combined and Student Return Fields 76 and 77

Field 76 is PGCESBJ and field 77 is PGCECLSS.

HESA requires that the classification of the first degree is returned for Postgraduate Certificate of Education (PGCE) students. To derive this information, the HESA return generation process needs to know which awards held in Oracle Student System can be awarded as first degrees. This is done by defining the code values for the code OSS_QUAL_1ST_DEGREE in the HESA Maintain Codes window. Each Oracle Student System award awarded as a first degree should be added to this set of reference codes.

Prerequisites

Program awards and associated grading schema are set up.

The awards must be defined with system award type of **Program**.

Navigation

See Maintain Codes for navigation information.

Additional Notes and Business Rules

See Maintain Codes for more information.

27.8 HESA Combined and Student Return Field 66

Field 66 is FEEELIG.

If the fee eligibility is not entered directly for a student for student unit set attempt HESA details, it is derived using the special student indicator, the FE student marker, the mode of student, and the fee category. This is done using the following code mappings:

- **OSS_FEECAT_FEEELIG_ASSOC**: Maps the Oracle Student System fee category codes to the Oracle Student System fee eligibility codes
- **OSS_FESTUMK_FEEELIG_ASSOC**: Maps the Oracle Student System FE student marker codes to the Oracle Student System fee eligibility codes
- **OSS_MODE_FEEELIG_ASSOC**: Maps the Oracle Student System mode of study codes to the Oracle Student System fee eligibility codes
- **OSS_SPCSTU_FEEELIG_ASSOC**: Maps the Oracle Student System fee eligibility to the Oracle Student System fee eligibility codes

The mappings are maintained in the Maintain Code Mappings window.

Prerequisites

The following codes are set up:

- OSS_FEEELIG
- OSS_FESTUMK
- OSS_MODE_TYPE
- OSS_SPCSTU

Navigation

See Maintain Codes and Maintain Code Mappings for navigation information.

Additional Notes and Business Rules

See Maintain Codes and Maintain Code Mappings for more information.

27.9 HESA Combined and Student Return Field 31

Field 31 is TTACCOM.

If the student term time accommodation indicator is not entered directly for the student at for student unit set attempt HESA details, it is derived from the location of study or the term time address. This is done using the HESA code mappings **OSS_ADDRUS_TTA_ASSOC** and **OSS_TTA_LOCSDY_ASSOC** which are maintained in the HESA Maintain Code Mappings window.

The mapping **OSS_TTA_LOCSDY_ASSOC** maps the Oracle Student System location of study codes to the Oracle Student System term-time accommodation codes. This allows you to set up a direct association between the OSS location of study codes and the OSS Term time address codes so that the appropriate term time address value can be derived for all students who are studying abroad for a year, without having to manually record a value for the term time accommodation, TTACCOM field for all the students.

To derive the term time accommodation indicator from the term time addresses, the HESA extraction process needs to be able to identify term-time addresses. This is based on the address usage. All the address usage codes that may be used to record a term-time address must be defined as codes for the reference code **TERM_TIME_ADDR**. The values entered must be the party site codes.

The mapping **OSS_ADDRUS_TTA_ASSOC** allows you to map the address usage codes to the Oracle Student System term time accommodation codes.

Prerequisites

The following codes are set up:

- OSS_TTA
- OSS_LOCSDY

Navigation

See Maintain Codes for navigation information.

Additional Notes and Business Rules

See Maintain Codes for more information.

27.10 HESA Module Return Field 6

Field 6 is FTE.

If a module return is submitted to HESA, the unit FTE is derived using the enrolled credit points and the unit level. To derive the unit FTE, the HESA calculation needs to know the annual credit points that a student is expected to study at that level. This requires that the annual credit is defined using the HESA Maintain Codes window for the reference code **ANNUAL_CREDIT** and that the annual credit and unit level are mapped using the HESA Maintain Code Mappings window using the code association **LEVEL_ANNUAL_CREDIT_ASSOC**.

Prerequisites

Unit levels are set up.

Navigation

See Maintain Code Mappings for navigation information.

Additional Notes and Business Rules

See Maintain Code Mappings for more information.

27.11 HESA Combined and Student Return Field 65

Field 65 is FUNDCODE.

To derive the HESA field 65 FUNDCODE, the HESA return generation process needs to be able to identify students who are deemed to be overseas students when it comes to paying tuition fees. The person residency status associated with the residency class which is used to calculate tuition fees. That means the value of the profile option IGS: Residency Class, is used to identify these students. Overseas Students are identified to the HESA return generation process by assigning the Oracle Student System person residency status codes that identify overseas students to the code set **OSS_RESIDENCY_OSS** in the HESA Maintain Codes window.

The return generation process also looks at the student's major source of funding to determine whether they are funded by a funding council. Therefore a mapping is required between them. This is done by setting up a mapping **OSS_MSFUND_FUNDCODE_ASSOC** between the Oracle Student System major source of funding codes and Oracle Student System fundability codes.

Prerequisites

Person Residency Status lookup is set up.

Funding sources are set up.

The following code is set up:

- `OSS_FUND_CODE`

Navigation

See Maintain Codes and Maintain Code Mappings for navigation information.

Additional Notes and Business Rules

See Maintain Codes and Maintain Code Mappings for more information.

27.12 HESA Combined and Student Return Field 68

Field 68 is **MSTUFEE**.

To derive the HESA field 68 **MSTUFEE**, the HESA return derivation process needs to identify which sponsor is used within Oracle Student System to represent the Student Loans Company. Whether the Local Education Authorities in which the students were domiciled when they applied for the contribution towards tuition fees falls under the Student Awards Agency for Scotland, the DELNI/ Northern Ireland Education and Library Boards or is an English or Welsh Local Education Authority, LEA.

The derivation process also allows a pre-defined **MSTUFEE** code to be returned for students with specified values for the **SPCSTU**, special student and **MODE**, mode of study fields (28 and 70).

To identify the SLC sponsor to the HESA derivation process, the Oracle Student System sponsor code has to be assigned to the HESA reference code **OSS_SLC_SPONSOR** in the HESA Maintain Codes Window. The LEA codes that are used within the student SLC identifiers are defined as HESA reference codes with type **OSS_SLC_LEA** and the HESA **MSTUFEE** codes are defined as HESA reference codes with type **HESA_MSTUFEE** also on the HESA Maintain Codes Window.

The mapping between the HESA **SPCSTU** codes and the **MSTUFEE** codes, the HESA **MODE** and **MSTUFEE** codes and the HESA **MSTUFEE** code and the LEA codes are all defined on the HESA Maintain Code Mappings window using the following mappings:

Table 27–13 MSTUFEE Code Mappings

Mapping	Prerequisite
HESA_SPCSTU_	HESA_SPEC_STUD
MSTUFEE_ASSOC	HESA_MSTUFEE
HESA_MODE_MSTUFEE_	HESA_MODE
ASSOC	HESA_MSTUFEE
OSS_HESA_SLCID_	OSS_SLC_LEA
MSTUFEE_ ASSOC	HESA_MSTUFEE

27.13 Identify Highest Qualification on Entry Grading Schema

The UCAS Tariff Calculation concurrent process calculates the highest qualification on entry for return to HESA. The HESA highest qualification on entry codes are defined as grading schema which are associated with the grading schemas used for recording entry qualifications.

The highest qualification on entry is derived from the qualification details recorded for a student. Qualifications are defined as awards within the Oracle Student System. If a qualification is only used for recording entry qualifications, then it should be defined as an award with system award type **Entry Qualification**. If a qualification can also be an institution exit award, for example, BS, then it can be set up as award with system award type **Program** so that it can be used to record entry qualifications and awards.

If you choose to use awards with system award type **Entry Qualification** and awards with system award type **Program** when recording qualification details for the student then to calculate the highest qualification on entry correctly, you need to set up two highest qualification on entry grading schemas, one with grading schema type **Secondary and Tertiary Award** and one with type **Honors Level Grading Schema**.

The **Grade Rank** field is used to determine which code should be returned to HESA if a student has entry qualifications at different levels, the code with the lowest grade rank being returned. The grading schemas for the entry qualifications should then be mapped to the HESA highest qualification on entry grading schema with type **Secondary and Tertiary Award** and the grading schemas for the entry qualification/ exit awards should be mapped to the HESA highest qualification on entry grading schema with type **Honors Level Grading Schema** using the grade translation functionality.

See Chapter 19, "Records: Assessments" for more information on defining grading schemas and grade translations.

The calculation process needs to be able to identify which of the Oracle Student System grading schemas defines the HESA highest qualification on entry codes. This is done by assigning the grading schema codes to the reference code **HESA_HIGH_QUAL_ON_ENT** in the HESA Maintain Codes window.

Prerequisites

Grading schemas are set up to represent the HESA highest qualification on entry codes.

Awards and associated grading schema are set up to represent the qualifications.

The system award type can be either **Program** or **Entry Qualification**.

Grade translation between the entry qualification and highest qualification on entry grading schema is set up.

Navigation

See Maintain Codes for navigation information.

Additional Notes and Business Rules

See Maintain Codes for steps information.

Modifying and Adding Rules

28.1 Rules Overview

Rules syntax includes operators, parameters, functions, and variables for the creation of rules. Rules windows can be accessed from several windows in different subsystems and are dynamically configured. The following information varies depending on how the Rules windows are accessed:

- Available rules
- Field names
- Available logical operators, such as +, -, and, or, ()
- Available parameters and functions, such as ADM_APPL_STATUS, sex
- Available variables, such as 0 to 9, A to Z, %, unit codes, unit set codes

You determine how rules functionality is applied to your business practices. Nonspecialist functions are usually limited to modifying rules that have a return type of **String**.

28.1.1 Terminology

The following describes rules terms:

General rules: Group of rules that can be called by other rules and can be defined uniquely by the rule description and return type. General rules can be viewed in the Rule window.

Specific rules: Rule that must be considered in context because it is assigned to particular data elements of Oracle Student System. For example, unit version rules are assigned to particular unit codes and version numbers.

Return type: Type of result a rule can return, such as STRING, BOOLEAN, and SET

Operators: Symbols or text representing functionality. Examples include +, -, and AND.

Parameters: Data items and their values. For example, the parameter Sex has values of FEMALE, MALE, and UNKNOWN.

Functions: Allowable range of rules that can be called by other rules. In general, parameters and functions are the same because functions or other rules often return values to the calling rule.

Variables: Characters used to represent variables. For example, the numbers 0 through 9 can be used to represent numeric variables.

28.2 Modifying Seeded Rules IGSRU001

You can update the seeded Oracle Student System rules. Examples of seeded rules include finance rules and GPA rules.

The description and rule text for general seeded rules can be edited or deleted by a specialist user.

Navigation

Setups > Group Rules > Group Rules > Edit Rule > Rule

Steps

1. Click **Options/Validate** to display all logical operators, parameters, functions, variables, rules, instructions for entering variables, successful messages, or unsuccessful messages in the Rule Options region.

Instructions appear with three asterisks (***) before and after the instruction.

2. In the Rule Text tab, revise rule text.
3. Click **Options/Validate** to validate the rule text.

Note: If there is any Invalid rule text, it appears in the Unprocessed field.

4. Correct invalid rule text.
5. Click **Options/Validate** to revalidate rule text.

Note: If a rule is invalid, the text that fails to meet the rules syntax logic is removed from the Rule Text tab and inserted in the Unprocessed field. After corrections are made to the text in the Unprocessed field or Rule Text tab, if the logic is correct, the text is reinserted.

6. Optionally, in the Comments tab, enter comments related to the rule.
7. Save your work.

The rule text is validated. If the rule fails, it is not saved.

8. Close the window.

Additional Notes

Rule descriptions: Rule descriptions must be unique and cannot include the number or pound (#) character.

Space: When clicking the button beside a rule operator, parameter, function, or rule, a space must be entered in the Rule Text tab.

Valid rules: Only valid rules can be saved and only rules that are not called by other rules can be deleted.

Variables: The variables displayed include unit codes and unit set codes only. When you enter the first part of a variable and click **Options/Validate**, a list of variables that start with the entered text appears. If the number of returned variables is large, a message appears to enter more text. When the list of variables appears in the Rule Option region, the entered text appears in the Unprocessed field and must be deleted manually.

28.3 Adding Rules IGSRU002

New rules must be added in the context of a rule group or subgroup. New general rules must be added in the context of a particular group or subgroup in the Group Rules window.

Rules are organized into groups and subgroups. Subgroups determine hierarchy within rule groups that enables logical grouping and branches to be created for rules.

Specific rules must be considered in the context of a specific window. For example, unit version rules must be attached to a specific unit code and version in the Program Version Rules window or the Program Stages window. For these rules, a specialist user cannot define the rule description, but can define the rule text in the Group Rules window.

Navigation

Setups > Group Rules > Group Rules

Query the appropriate record.

Select the appropriate rule group or subgroup by clicking on the value in the Rule Group or Rule Subgroup fields.

Click **Add Rule**.

The Rule window appears.

Steps

1. In the Rule Description, enter a short description for your new rule.
2. Click **Options/Validate** to display all logical operators, parameters, functions, variables, rules, instructions for entering variables, successful messages, or unsuccessful messages in the Rule Options region.
3. Create rule text.
4. Click **Options/Validate** to validate rule text.

Note: If a rule is invalid, the text that fails to meet the rules syntax logic is removed from the Rule Text tab and inserted in the Unprocessed field. After corrections are made to the text in the Unprocessed field or Rule Text tab, if the logic is correct, the text is reinserted.

5. Correct any invalid text.
6. Save your work.

Additional Notes

Queries: Queries can be performed in the Rule Group region or the Rule Subgroup.

Implementation Verification

29.1 Calendar Quality Check Exception Report

This concurrent process checks your calendar setup.

29.1.1 Calendar Quality Checks

Quality checks help you ensure that you have configured calendars the way you want.

29.1.1.1 Load Calendar Checks

The following table shows Load Calendar checks.

Table 29–1 Load Calendar Checks

Report Output Message	Explanation	Action
Load calendars should normally have only academic, award, admission, fee, progression, and user defined calendars as superiors	Load calendars can now have academic, award, admission, fee, progression, and user defined calendars as superior calendars.	Delete the invalid superior calendar and any other parent calendars not required in the Calendar Instance Relationships window

Table 29–1 (Cont.) Load Calendar Checks

Report Output Message	Explanation	Action
Load calendar instance must have one and only one load effective date alias instance	<p>This date alias is used to determine which is the current load calendar for purposes of point-in-time load and attendance type calculations. It looks for the most recently occurring instance of this date alias and uses the load calendar in which it exists.</p> <p>This message is usually displayed where:</p> <ul style="list-style-type: none">■ No instance of the date alias is found in a load calendar <p>or</p> <ul style="list-style-type: none">■ More than one instance of the date alias is found in a load calendar	<p>Check for instance/s of the Load Effective date alias in the Maintain Date Alias Instances window and either:</p> <ul style="list-style-type: none">■ Create an instance if none exist <p>or</p> <ul style="list-style-type: none">■ Delete any extra instances leaving one remaining. <p>The date alias to use as the Load Effective date alias must first be defined in the Enrollment Calendar Configuration window.</p>
Linked to a teaching calendar type that has no instance associated with the academic period	<p>This message is displayed where the teaching calendar is not linked to the same academic period as the load calendar. Consequently, load calculations will fail because the appropriate teaching calendar instance for the load calendar cannot be determined.</p>	<p>Check that the correct teaching calendar type is mapped to the load calendar instance in the Load Calendar Structure window.</p> <p>If this is correct, check that both the load and teaching calendar instances have the correct parent academic calendars.</p>

Table 29–1 (Cont.) Load Calendar Checks

Report Output Message	Explanation	Action
Teaching calendar type has only one instance associated with the academic calendar; second percentage is not required	A second percentage load apportion is only required if instances of the teaching calendar type span two academic calendars and therefore another instance of the context load calendar. A second percentage is only recorded if it differs from the first percentage.	Delete the second percentage from the load calendar instance teaching calendar type in the Load Calendar Structure window.
Attendance type has no attendance type load detail and therefore cannot be derived within the load calendar	This message is displayed where at least one program attendance type has not been defined for at least one load calendar type. For example: the enrollment load range for attendance type PT is defined for load calendars Fall and Spring, but not calendar summer.	Check that all attendance type load ranges have been defined in the Program Attendance Types window.
There is no gap in the attendance type load ranges for the load calendar	When defining attendance type load ranges for a specified load calendar type, some load values may not have had an attendance type defined.	Check all attendance type definitions within the load calendar type for gaps in the Program Attendance Types window. Modify as appropriate.

29.1.1.2 Enrollment Calendar Checks

The following table shows Enrollment calendar checks.

Table 29–2 Enrollment Calendar Checks

Report Output Message	Explanation	Action
Enrollment calendars should not normally have any subordinate calendars	Invalid subordinate calendars, with the exception of user defined calendars, are not allowed.	Delete the invalid subordinate calendar in the Calendar Instance Relationships window.

29.1.1.3 Admissions Calendar Checks

The following table shows Admissions calendar checks.

Table 29–3 Admissions Calendar Checks

Report Output Message	Explanation	Action
Admission calendars should have only one superior calendar of a particular Academic calendar type	Admission processes are always in the context of a particular academic period.	Admission processes are always in the context of a particular academic period.
Admission calendars should have at least one superior Teaching calendar	Parent teaching calendar/s are required if units are to be specified in applications. For example: non-award single unit.	Ensure appropriate parent teaching calendar/s exist in the Calendar Instance Relationships window. Note: Only those teaching periods relevant to the context admission period can be mapped.
Admission calendars should be defined for at least one Admission category	Admission calendars cannot be utilized, and therefore admission applications cannot be processed, unless the admission calendar is mapped to one or more admission categories.	Ensure that each admission calendar is mapped to appropriate admission categories in the Admission Period Calendars window.

Table 29–3 (Cont.) Admissions Calendar Checks

Report Output Message	Explanation	Action
Admission calendar does not have an initialization date	<p>If the admission process definition for the admission category includes the steps RECONSIDER and/or DEFER, then the system date alias 'Initialize Adm Period Date Alias' must be defined in associated admission calendars.</p> <p>This is the date on which background processing for an admission period is run.</p> <p>For example: Admission Application Processing Status and the Create Deferment Applications concurrent process.</p>	<p>Check for an instance of the 'Initialize Adm Period Date Alias' in the Date Alias Instances window and create an instance if none exist.</p> <p>Note: The date alias to use as the InitializeAdmPeriodDate Alias must first be defined in the Admissions Calendar Configuration window.</p>
Admission calendar does not have an encumbrance checking date	<p>If the admission process definition for the admission category includes the encumbrance checking step, then the system date alias Encumbrance Check Date Alias must be defined in associated admission calendars.</p>	<p>Check for an instance of the Encumbrance Check Date Alias in the Date Alias Instances window and create an instance if none exist.</p> <p>Note: The date alias to use as the Encumbrance Check Date Alias must first be defined in the Admissions Calendar Configuration window.</p>
Admission calendar does not have a program start date	<p>This date alias is used to derive the program attempt commencement in the Student Enrollments window. If the Program Start Date Alias does not exist in the admission period, the system uses the program commencement date recorded for the context admission period, or the system date if the date of enrolment is later than the academic period course commencement date.</p>	<p>Check for an instance of the Program Start Date Alias in the Date Alias Instances window and create an instance if none exist.</p> <p>Note: The date alias to use as the ProgramStartDateAlias must first be defined in the Admissions Calendar Configuration window.</p>

Table 29–3 (Cont.) Admissions Calendar Checks

Report Output Message	Explanation	Action
Admission calendar has more than one application due date that is not mapped to an override	<p>The application due date is a user defined date alias mapped to Due Date Alias in the Admissions Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.</p> <p>The first occurring due date is the default application due date for all admission applications associated with the admission period/admission category. The default date may be overridden in the Admission Period Date Overrides window. Due date overrides are other instances of the same date alias in the same admission calendar.</p> <p>This message is displayed where there is at least one instance of the due date alias in the admission period (other than the default date alias) that is not being used as an override.</p>	<p>Check for application due date alias instances in the admission calendar that are not being used as an override.</p> <p>Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases.</p> <p>Note: Some instances may have been created in advance as possible overrides, these may not need to be deleted.</p>
Admission calendar has more than one application final date that is not mapped to an override	<p>The application final date is a user defined date alias mapped to 'Final Date Alias' in the Admissions Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.</p>	<p>Check application final date alias instances in the admission calendar that are not being used as an override. Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases.</p>

Table 29–3 (Cont.) Admissions Calendar Checks

Report Output Message	Explanation	Action
None	The first occurring final date is the default application final date for all admission applications associated with the admission period/admission category. The default date may be overridden in Admission Period Date Overrides window. Final date overrides are other instances of the same date alias in the same admission calendar. This message is displayed where there is at least one instance of the final date alias in the admission period (other than the default date alias) that is not being used as an override.	Note: some instances may have been created in advance as possible overrides, these may not need to be deleted.
Admission calendar has more than one application offer response date that is not mapped to an override	The application offer response date is a user defined date alias mapped to Offer Response Date Alias in the Admission Calendar Configuration window. There is typically at least one instance of the date alias in each admission calendar.	Check application offer response date alias instances in the admission calendar that are not being used as an override.

Table 29–3 (Cont.) Admissions Calendar Checks

Report Output Message	Explanation	Action
None	The first occurring offer response date is the default application offer response date for all admission applications associated with the admission period/admission category. The default date may be overridden in Admission Period Date Overrides window. Offer response date overrides are other instances of the same date alias in the same admission calendar. This message is displayed where there is at least one instance of the offer response date alias in the admission period (other than the default date alias) that is not being used as an override.	Check existing date aliases against those in use in Admission Period Date Overrides window. Delete any instances not used as default or override date aliases. Note: some instances may have been created in advance as possible overrides, these may not need to be deleted.
Admission calendars should have one superior Academic calendar	See first admission calendar check item.	Delete invalid parent academic calendars in the Calendar Instance Relationships window.
Academic term (load) should have one superior Admission Calendar Instance	There is a mandatory one-to-one relationship between an admission and a load calendar	Delete invalid subordinate admission calendars in the Calendar Instance Relationships window. Create a subordinate Load calendar if one does not exist in the Calendar Instance Relationships window.

29.1.1.4 Teaching Calendar Checks

The following table shows Teaching calendar checks.

Table 29–4 Teaching Calendar Checks

Report Output Message	Explanation	Action
Teaching calendars should normally have only superiors of Academic, Progression, Examination or Assessment calendars (calendar category)	Valid superior calendars for teaching calendars are academic, assessment, exam, progression, holiday and user defined calendars.	Delete the invalid superior calendar in Calendar Instance Relationships
Teaching calendars must have at least one Census Date alias instance within the bounds of the academic calendar start/end dates	NA	<p>Check for instances of Census Date alias in the Date Alias Instances window and create an instance if none exist.</p> <p>Note: The date alias to use as the Load Effective date alias must first be defined in the Enrolment Calendar Configuration window.</p>

Table 29–4 (Cont.) Teaching Calendar Checks

Report Output Message	Explanation	Action
Total load apportionment for the teaching calendar instance does not total 100%	<p>This message is used to identify cases where a particular teaching calendar instance has a total distribution of load (to one or more load calendars) that does not equal 100%. For example: load for teaching period S1-E1 (1998-1999) is distributed as follows - 33.33% to load calendar 1 (1998), load calendar 2 (1998), load calendar 1 (1999). Total apportionment is 99.99%.</p> <p>This message can appear where straddling teaching periods are rolled over and a load calendar does not exist for the last apportionment. For example: the academic year 1998 is rolled over to 1999. A new instance of the S1-E1 teaching period is created (1999 - 2000). The calendar quality check would detect that only two thirds of the apportionment is available (load calendar 1 (1999) and load calendar 2 (1999)). This problem can be resolved by creating an instance of load calendar 1 (2000).</p>	<p>Check apportionment details for specified teaching calendar instances in the Load Calendar Structure window. Correct as necessary.</p> <p>Note: as load apportionment is defined at the teaching calendar type level, rather than the instance level, it is necessary to identify which teaching calendar instances relate to which load calendar instances.</p>

Table 29–4 (Cont.) Teaching Calendar Checks

Report Output Message	Explanation	Action
All administrative unit statuses used within teaching calendar instances must be linked to the apportionment load calendar instances via the administrative unit status load structure (administrative unit status)	<p>This message occurs where an administrative unit status is mapped to a discontinuation date alias the Enrollment Calendar Configuration window. The discontinuation date alias is in turn, mapped to one or more instances within teaching calendar instances that are defined in the load calendar structure. However, the administrative unit status has not been recorded for the load calendar/teaching calendar load apportionment.</p> <p>For example: the administrative unit status WD-LATE is mapped to the discontinuation date alias WDN-LATE. This date alias has an instance in the teaching calendar SEM-1 (1998). Teaching calendar type SEM-1 is linked to load calendar 1 (1998) in the Load Calendar Structure window. However, the administrative unit status WD-LATE has not been recorded in the Administrative Unit Status Load block of the Load Calendar Structure window for the load calendar/teaching calendar load apportionment.</p>	<p>First check that the administrative unit statuses are defined within the discontinuation date criteria in the Maintain Unit Discontinuation Date Criteria window.</p> <p>Check in the Load Calendar Structure window that all used administrative unit statuses are defined in the context of each load calendar/teaching calendar load apportion.</p> <p>If not, create appropriate administrative unit status load records.</p>
Teaching calendars should have at least one Admission subordinate calendar	NA	Add a valid subordinate Admission calendar in the Calendar Instance Relationships window.

29.1.1.5 Configuration Dates Checks

The following table shows Configuration Dates checks.

Table 29–5 Configuration Dates Checks

Report Output Message	Explanation	Action
Load Effective Date alias instances should exist only within Load calendar instances	This date alias is used to determine which is the current load calendar for purposes of point-in-time load and attendance type calculations. It looks for the most recently occurring instance of this date alias and uses the load calendar in which it exists. Instances in calendars other than load have no effect.	Delete instances of the load effective date alias that do not exist in load calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Commencement Date alias instances should exist only within Academic calendar instances	This is the date alias representing the commencement date within an academic period calendar instance. Only one commencement date alias can exist in each academic period calendar instance. Instances of this date alias in calendars other than academic have no effect.	Delete instances of the commencement date alias that do not exist in academic calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Commencement Cutoff alias instances should exist only within Teaching calendar instances	This is the date alias within a teaching period on which a student is no longer considered as commencing their course. The system looks for an instance of this date alias in the student's first enrolled teaching period to determine if they are a commencer (new) or a non-commencer (returning). The census date is normally used as this date alias. Instances of this date alias in calendars other than teaching have no effect.	Delete instances of the commencement date alias that do not exist in teaching calendars in the Date Alias Instances window. Note: The user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.

Table 29–5 (Cont.) Configuration Dates Checks

Report Output Message	Explanation	Action
Enrolment Form Due Date alias instances should exist only within Academic or Enrolment calendar instances	This date alias is used as a default enrolment form due date. The default is only used if an override form due date is not specified when the pre-enrolment routine is run. Instances of this date alias in calendars other than academic and enrolment have no effect. (This will be updated in the near future to only apply to Enrollment calendar instances).	Delete instances of the commencement date alias that do not exist in academic or enrolment calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.
Enrolment Package Production Date alias instances should only exist within Academic or Enrolment calendar instances	This date alias is used as a default enrolment package production date. The default is only used if an override package production date is not specified when the pre-enrolment routine is run. Instances of this date alias in calendars other than academic and enrolment have no effect. (This will be updated in the near future to only apply to Enrolment calendar instances).	Delete instances of the commencement date alias that do not exist in academic or enrolment calendars in the Date Alias Instances window. Note: the user defined date alias mapped to this date alias is defined in the Enrollment Calendar Configuration window.

29.1.1.6 Award Calendar Checks

The following table shows Award calendar checks.

Table 29–6 Award Calendar Checks

Report Output Message	Explanation	Action
Award calendar instance should have at least one subordinate Academic Term (Load) calendar instance	There is a mandatory relationship between Award and at least one Academic Term (Load) calendar if using the Financial Aid subsystem.	Create a relationship between an Award and Academic Term (Load) calendar in the Calendar Instance Relationships window

29.2 UCAS Records Importing Verification

To verify that UCAS applicant and application records can be successfully imported, check that the following setup has been completed:

1. Person source types **UCAS APPL** and **UCAS PER**.
2. Admission source categories for the source types **UCAS APPL** and **UCAS PER**.
3. Match criteria sets for the source types **UCAS APPL** and **UCAS PER**.
4. Alternate person ID types for **UCAS ID** and **UCASREGNO**.

In addition, the following alternate person ID types must be set up:

- **NMASID** if using the NMAS and Admissions system
- **SNASID** if using the NMAS and Admissions system

Oracle Student System Flexfields

A.1 Flexfields

The following table describes descriptive flexfields in Oracle Student System.

Table A-1 Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_AD_APP_INTENT	Application Intent	Admissions
IGS_AD_HZ_ACAD_HIST	Academic History	Person / System Wide Services
IGS_AD_INTVW_PNLS	Interview Panel Flex Field	Admissions
IGS_AD_LOCATION_ALL	Locations	Organizational Structure
IGS_AD_PANEL_DTLS	Interview Panel Details Flex Field	Admissions
IGS_AD_PANEL_MEMBRS	Interview Panel Member Flex Field	Admissions
IGS_AD_PNMEMBR_DTLS	Interview Panel Members Flex Field	Admissions
IGS_AD_PS_APPL_INST_ALL	Program Application Instance	Admissions
IGS_AD_TEST_RESULTS	Test Results	Admissions
IGS_AD_TSTSCR_USED	Admission Test Scores	Admissions
IGS_AD_TST_RSLT_DTLS	Test Segment Details	Admissions
IGS_AS_ASSESSMNT_ITM_ALL	Assessment Items	Academic Records

Table A–1 (Cont.) Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_AS_GRD_SCHEMA	Grading Schemas	Academic Records
IGS_AS_GRD_SCH_GRADE	Grading Schema Grades	Academic Records
IGS_AS_SU_ATMPT_ITM	Unit Attempt Assessment Item	Academic Records
IGS_AS_SU_SETATMPT	Unit Set Attempts	Academic Records
IGS_AS_SU_STMPTOUT_ALL	Student Unit Attempt Outcomes	Academic Records
IGS_AZ_GROUPS	Advising Group	Academic Records
IGS_DA_CNFG_REQ_TYP	Degree Audit Request Type	Academic Records
IGS_EN_SPA_TERMS	Term Record	Enrollment
IGS_EN_STDNT_PS_ATT_ALL	Student Program Attempt	Enrollment
IGS_EN_STDNT_PS_INTM	Student Program Intermission	Enrollment
IGS_EN_SU_ATTEMPT_ALL	Student Unit Attempt	Enrollment
IGS_EN_UNIT_SET_ALL	Unit Set Attempt	Enrollment
IGS_FI_CREDITS_ALL	Credits	Student Finance
IGS_FI_CR_TYPES_ALL	Credit Types	Student Finance
IGS_FI_FIN_LT_PLAN	Finance and Late Charge Plans	Student Finance
IGS_FI_IMPCHGS_LINES	Ancillary Charges	Student Finance
IGS_FI_INVLN_INT_ALL	Charge Lines	Student Finance
IGS_FI_LOCKBOXES	Lockboxes	Student Finance
IGS_FI_PP_STD_ATTRS	Payment Plan	Student Finance
IGS_FI_REFUNDS	Refunds Descriptive Flexfield	Student Finance
IGF_AW_FUND_MAST_ALL	Define Sponsor Flexfield	Student Finance
IGS_GR_GRADUAND_ALL	Graduand Details	Academic Records

Table A-1 (Cont.) Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_PE_ALT_PERS_ID	Person Alternate ID	Person
IGS_PE_CONTACT_DTLS	Person Email Details	Person
IGS_PE_HLTH_INS_ALL	Health Insurance	Person
IGS_PE_IMMUN_DTLS	Health Requirement	Person
IGS_PE_MIL_SERVICES_ALL	Military Services	Person
IGS_PE_PERSID_GROUP_ALL	Person Group ID	Person
IGS_PE_PERS_DISABLT	Person Special Needs	Person
IGS_PE_RES_DTLS_ALL	Person Residency Details	Person
IGS_PE_RES_DTLS_H	Residency Details History	Person
IGS_PE_STAT_DETAILS	Person Statistics	Person
IGS_PE_VISA	International Visa Details	Person
IGS_PS_FAC_WL	Faculty Task Assignment/Override Workload	Program Structure and Planning
IGS_PS_OFR_ALL	Program Offerings	Program Structure and Planning
IGS_PS_OFR_OPT_ALL	Program Offering Options	Program Structure and Planning
IGS_PS_UNIT_VER_ALL	Unit Version Details	Program Structure and Planning
IGS_PS_USEC_OCCURS_ALL	Unit Section Occurrence Details	Program Structure and Planning
IGS_PS_USEC_REF	Unit Section Reference Description	Program Structure and Planning
IGS_PS_VER_ALL	Basic Program Details	Program Structure and Planning
IGS_RC_IS_INQUIRY	Prospective Applicant Inquiry	Student Recruiting
IGS_RC_I_APPL_ALL	Inquiry Instance Flex Field	Student Recruiting

Table A-1 (Cont.) Oracle Student System Flexfields

Table	Flexfield	Subsystem Owner
IGS_SS_APP_PGM_STG	Self Service Application Details Flexfield	Admissions
IGF_AP_FA_BASE_REC_ALL	Financial Aid Base Record Flexfield	Financial Aid
IGF_AW_AWARD_ALL	Financial Aid Awards Flexfield	Financial Aid
IGF_AW_FUND_MAST_ALL	Fund Manager Flexfield	Financial Aid

Oracle Student System Profile Options

The values available for certain profile options may be defined during setup of Oracle Student System setup windows. As a result, the profile option is dependent on completed setup for that window.

B.1 Oracle Student System Profile Options

All Oracle Student System profile options are set up during the completion of subsystem setup activities discussed previously in this guide. The following table is a complete list of all IGS and IGF profile options and is included for reference purposes only.

Table B–1 Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
ECX: Log File Path	Set the directory paths for XML messages, processing log files, and XSLT style sheets	Log File Path where the XML messages and runtime log are stored Default value is None.	None	Site	Required if using XML Gateway
ECX: XSLT File Path	Set the directory paths for XML messages, processing log files, and XSLT style sheets	XSLT Path where XSLT style sheets are stored Default value is None.	None	Site	Required
ECX: System Administrator Email Address	Set the XML Gateway System Administrator e-mail address	XML Gateway System Administrator e-mail address Default value is None.	None	Site	Required
ECX_OAG_LOCALID	Set to identify sender's information system	Identifier for Sender's Information System Default value is None.	None	Site	Optional
ECX: Server Time Zone	Set the time zone for the database server	The time zone in which the data-base server is running Default value is Null.	None	Site	Required
ICX: Discoverer Release	Specify the Discoverer release	Specify the Discoverer release you want to use	None	Site	Required if using Discoverer
ICX: Discoverer End User Layer Schema Prefix	Prefix for EUL	Set the user-defined End User Layer	None	Site	Required if using Discoverer
ICX: Discoverer Launcher	URL for pointing out the Discoverer Server launch page	Set the user-defined URL for the Discoverer Server launch page	None	Site	Required if using Discoverer

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
ICX: Discoverer Viewer Launcher	URL for pointing out the Discoverer Viewer Servlet	Set the user-defined URL for the Discoverer Viewer Servlet	None	Site	Required if using Discoverer
ICX: Discoverer Use Viewer	Set to indicate Discoverer Plus or Discoverer Viewer.	When set to Y, Discoverer Viewer is launched. When set to N, Discoverer Plus is launched. Default is Discoverer Plus.	None	Site	Required if using Discoverer
Final Unit Set Derivation	Specifies the logic for deriving final unit set for a self-service admission application when submitted by a student	Values include Not be derived, Derived as the unit with the lowest preference number, and Derived as the unit set with the highest preference number.	IGS_AD_DERIVE_FINAL_US	Site Application Responsibility	Required
FND: APPTREE create public folders	Save personal or public shortcut nodes in the Organizational Structure Setup window	Default value is No. When set to No, personal and public shortcuts are not saved as nodes in the Organizational Structure Setup window. When set to Yes, personal and public shortcuts are saved as nodes in the Organizational Structure Setup window.	None	Site User	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGF: Always Use Lower of Institutional or Federal Need	Set to use institutional or federal needs	<p>Values are Yes and No. When awarding IM funds and Yes is selected and student has an Awarding ISIR and no existing funds based on federal methodology, then Oracle Student System uses the lower of federal and institutional methodology remaining need or fund maximum.</p> <p>If No is selected, then institutional methodology remaining need is used.</p>	IGF_AW_USE_LOW_IM_FM	Site	Required if using Institutional Methodology
IGF: Default Address Usage	Indicate preferred address usage	<p>Values are all person address usages. This gives the default address usage to be used when a person record is created by the ISIR import process.</p>	IGF_AP_DEF_ADDR_USAGE	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGF: INAS Integrated	Indicate if you have implemented the INAS calculator	<p>Values are Yes and No.</p> <p>When set to Yes, Institutional Methodology appears in the lists of values for Need Analysis Methodology Type field in the Fund Manager window and the Need Analysis - CSS PROFILE INAS EFC Calculation Process concurrent process.</p> <p>When set to No, Institutional Methodology is not available in the lists of values.</p>	IGF_AW_INAS_INTEGRATED	Site	Required
IGS: Academic History Display Type	Set to indicate academic history display type	Values are Career Mode, Program Mode, and YoP Mode	NA	Site	Required
IGS: Address Type for Residence	<p>Set address for Student Finance functionality</p> <p>This is not a default address for all address usage.</p>	<p>Default value is Bill To.</p> <p>Select an address usage. Address usages are extensible, which means that you can add values.</p>	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Admission Transcript Status	Set to indicate the status of the transcript to be used for selecting the Received check box	<p>Values include Partial, Final, and Others</p> <p>The value you enter in this profile option derives the Received check box in the Academic History Details window.</p> <p>If a transcript is entered as part of academic history details and the status matches what is set in this profile and the type matches what is set in IGS: Admission Transcript Type profile option, then the Received check box is selected.</p>	IGS_AD_TXCPT_STATUS	Site	<p>Optional</p> <p>If not defined, then the Received check box will never be selected.</p>
IGS: Admission Transcript Type	Set to indicate the types of transcripts that can be used to set the Received check box	<p>Values include Official and Unofficial</p> <p>The value you enter in this profile option derives the Received check box in the Academic History Details window.</p> <p>If a transcript is entered as part of academic history details and the type matches what is set in this profile and the status matches what is set in the IGS: Admission Transcript Status profile option, then the Received check box is selected.</p>	IGS_AD_TRANS_TYPE	Site	<p>Optional</p> <p>If not defined, then the Received check box will never be selected.</p>

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Advising Hold Type	Set advising hold type	<p>Set to define the hold that is used to create an enrollment clearance; for example, an Advising Hold.</p> <p>Values are user-defined.</p> <p>You must set up a hold type named Administrative. This Administrative hold type must be mapped to new hold effect type named Block All Enrollment Activity.</p> <p>This profile option is dependent on setup in the Person Hold Types window.</p>	None	Site	Required to set up advising holds; optional if you do not want to use advising holds functionality
IGS: AMS Category Type	Set to create deliverables	<p>Default values is Email.</p> <p>Values include Creative, Deliverable, Direct Mkg, Email, Event, Press/Analyst, Promotional Item, Publishing, Sales Tools, and Web.</p>	None	Site Application	Required
IGS: AMS Category Sub Type	<p>Set to create deliverables</p> <p>Must be set after IGS: AMS Category Type profile option. You must close the Profile Options window completely after setting the IGS: AMS Category Type profile option.</p>	<p>Default value is Body.</p> <p>Values include Body, Call to Action, Closing, Disclaimer, Greetings, Offering, Opt Out Link, and Referral.</p>	None	Site Application	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Approval Required for Person Creation	Set whether approval is required for person creation	<p>Default value is No. Values include Yes and No.</p> <p>When set to Yes, workflow notification will be used for the approval process in allowing a person to be created into the production tables.</p> <p>When set to No, workflow notification will not be used for the approval process in allowing a person to be created into the production tables.</p>	IGS_PE_APPROVAL _REQUIRED	Site	Optional
IGS: Approver of Person Creation	Set approvers for person creation	<p>Select FND user name.</p> <p>This profile option is used for routing workflow to create a person.</p> <p>An FND USER must be created.</p>	IGS_PE_USER_APPROVER	Site	Required if IGS: Approval Required for Person Creation profile option is set to Yes.
IGS: Attendance Type and Attendance Mode	Set attendance type and attendance mode	<p>Default value is Derived Values.</p> <p>When Derived Values is selected, the values are populated into the Oracle Student System and Oracle Financial Aid windows.</p> <p>When Nominated Values is selected, users must enter values in Oracle Student System and Oracle Financial Aid.</p>	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Automatically Flag Core/Optional Unit Attempts	Set to indicate if Core Indicator icon is displayed in self-service	<p>Default value is Off. Values include Off and On.</p> <p>When set to Off, the Core Indicator icon is not displayed in self-service even if units or unit sections are described as core in the pattern of study.</p> <p>CAUTION: There is nothing to prevent users from using the Bulk Unit Attempt Upload process to update the core indicator, if they so desire.</p> <p>If the profile option is set to OFF, but the enrollment category validation step Prevent Core Drop is set up, the validation step is not enforced.</p> <p>When set to On, the the Core Indicator icon is displayed in self-service.</p>	NA	Site	NA

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Call Number For Unit Section	Set a unique descriptor to use as quick reference for a unit section within a specific teaching period	<p>Default value is User Defined.</p> <p>Values include Auto Generated, None, User Defined.</p> <p>When User Defined is selected, users must set up the call numbers for unit section.</p> <p>When Auto Generated is selected, call numbers for unit sections are generated automatically.</p> <p>When None is selected, the call number is not generated by the system.</p> <p>This profile determines whether the call number is system generated or manually generated.</p>	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Career Model Enabled	Set to enable career model	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, Career functionality is enabled and you can enroll students in careers; for example, undergraduate and graduate, and establish relationships between programs and units.</p> <p>When the IGS: Career Model Enabled profile option is not selected during installation, Career functionality is not enabled, and you can enroll students in programs, not careers.</p> <p>Institutions in the United States are more likely to set the IGS: Career Model Enabled profile option to Yes.</p>	None	Site	Required
IGS: Charge Tuition for Audited Student Unit Attempt	Set to charge regular tuition on the audited student unit attempts	<p>Default value is No. Values include Yes and No.</p> <p>When set to No, tuition is not charged for audited student unit attempts.</p> <p>When set to Yes, tuition is charged for audited student unit attempts.</p>	IGS_FI_CHARGE_AUDIT_FEES	Site	Required

Table B-1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Citizenship Residence Status	Set default citizenship or residency status as defined in person statistics code citizenship status	<p>Enter a user-defined value.</p> <p>Values are defined in the Citizenship Status Lookup.</p> <p>This information defaults to Residency/ Citizenship Details window, Citizenship tab.</p> <p>This profile option is dependent on the values for lookup type PE_CITI_STATUS.</p>	IGS_PE_CTZN_CODE	Site	Required
IGS: Class Rank Cohort Management	Allows different levels of security to enable users to create and edit cohorts and change statues.	<p>Values include Yes and No.</p> <p>When set to Yes, creation of cohorts and editing of cohort rules is allowed.</p> <p>When set to No, creation of cohorts and editing of cohort rules is not allowed.</p> <p>When set at the site/application levels, the setting affects all users.</p> <p>When set at the responsibility level, the setting affects all users with the given responsibility.</p> <p>When set at the user level, the setting affects only the user.</p>	IGS_PR_ALLOW_COHORT_MGMT	Site Application Responsibility User	Optional

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Class Rank Override	Allows different levels of security to enable users to override an individual rank	<p>Values include Yes and No.</p> <p>When set to Yes, override of a student's rank is allowed.</p> <p>When set to No, override of a student's rank is not allowed.</p> <p>When set at the site/application levels, the setting affects all users.</p> <p>When set at the responsibility level, the setting affects all users with the given responsibility.</p> <p>When set at the user level, the setting affects only the user.</p>	IGS_PR_ALLOW_RAN_OVERRIDE	<p>Site</p> <p>Application</p> <p>Responsibility</p> <p>User</p>	Optional
IGS: Country Code	<p>Set country code for UK localization</p> <p>Required for US institutions.</p>	<p>Set to United States for US (localization) specific functionality.</p> <p>Set to United Kingdom for UK (localization) specific functionality. This enables the UCAS and HESA functionality.</p> <p>You must set this profile option in the Localization tab of the Organization Structure Data Setup window.</p>	None	<p>Site</p> <p>Application</p>	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Country of Citizenship	Set country of citizenship	<p>Enter country of citizenship.</p> <p>Values include all countries in the world.</p> <p>This information defaults into the Citizenship tab on the Residency/Citizenship Details window.</p>	IGS_PE_COUNTRY_CTZN	Site	Required
IGS: CRM User ID	Set CRM User ID for Correspondence	<p>Enter names of users for Correspondence functionality.</p> <p>To provide the values for this option, you need to enter values for IGS: Fulfillment Server ID profile option.</p> <p>After you enter these values, all the users related to that server will be available to select from.</p> <p>These values are set during setup.</p> <p>This profile option is dependent on setup.</p>	IGS_CO_CRM_USER_ID	Site	Required if using Correspondence functionality

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Decides whether the Religion Tab has to be Displayed	Display Religion Tab	<p>Default values is Yes. Values include Yes and No.</p> <p>When set to Yes, the Religion field in the Biographic tab on the Person Statistics window is visible.</p> <p>When set to No, the Religion field in the Biographic tab on the Person Statistics window is not visible.</p>	IGS_PE_DISPLAY_RELIGION	Site	Optional

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Degree Audit/Transfer Evaluation Options	Set to identify external software enabled at institution	<p>Default value is None.</p> <p>Values include Degree Audit Only, Combined Audit and Transfer Evaluation, Transfer Evaluation Only, No Degree Audit or Transfer Eval Software Enabled.</p> <p>Enter the value that reflects the third party degree audit software enabled at institution.</p> <p>No DA/TE software: No third party software is enabled.</p> <p>Degree Audit Only: The third party software can only process degree audit requests.</p> <p>Transfer Evaluation Only: The third party software can only process transfer evaluation requests.</p> <p>Combined: The third party software can process degree audit and transfer evaluation requests.</p> <p>When set to None, an error message is displayed and you cannot use the window. Further, options will not appear in self-service.</p>	IGS_DA_TRANSFER_EVAL	Site	Required

Table B-1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Degree Audit Student List	Set to enable individuals the ability to view lists of students during a batch request process	Default value is No. When set to Yes, allows viewing the list of students generated during a batch request student selection.	IGS_DA_STDNT_LIST_VIEW	Responsibility User	Required
IGS: Degree Audit Workflow Administrator	Set to identify degree audit's workflow administrator	Possible values are defined users. Enter the individual responsible for degree audit workflow.	IGS_DA_WF_ADMIN	Site	Required
IGS: Delivery Destination Name	Destination name used by delivery method type Set for correspondence print functionality	Select the printer name that is set in the RightFax server.	IGS_CO_DESTINATION_NAME	Site Responsibility User	Required if using Correspondence print functionality
IGS: Display Dropped Unit Sections in the Schedule - Administrator	Display dropped unit section in the schedule for administrative users in self-service	Default value is No. Values include Yes and No. When set to No, dropped unit sections are not displayed in the schedule. When set to Yes, dropped unit sections are displayed in the schedule.	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Display Dropped Unit Sections in the Schedule - Student	Display dropped unit section in the schedule for student self-service users	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, dropped unit sections are displayed in self-service for the student user.</p> <p>When set to No, dropped unit sections are not displayed in self-service for the student user.</p>	None	Site	Required
IGS: Duplicate Match Criteria	Set match criteria to check for duplicate person records during manual data entry. Not used during data import.	<p>Enter or select a match criteria set. This profile option uses the match criteria set attributes to determine how to check for duplicates during manual data entry.</p> <p>This profile option is dependent on setup in the Source Types window. Only the Match Criteria Sets assigned to the Source Types mapped to the System Source Type of Manual are valid.</p>	IGS_PE_DUP_MATCH_CRITERIA	Site	Required
IGS: Family Address Usage	Set address usage for Family Addresses window	<p>Default value is Home. Select an address usage. Address usages are extensible, which means that you can add values.</p>	IGS_AD_ADR_USG	Site	Required

Table B-1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Family Age Auto Population	Set family age auto population to set age in the Person Relationships window	Default value is 20. Values include numbers ranging from 5 to 40. If the person's age is less than the value set for this profile option, then all family members get this person's address with the usage as specified by the family address usage profile option.	IGS_AD_AUTONUM	Site	Required
IGS: Fax Destination Number	Enter the fax number for the fax machine that you want to send correspondence to	Destination (Fax) number used by delivery method type	IGS_CO_FAX_DESTINATION_NUMBER	Site Application Responsibility User	Required
IGS: Fulfillment Server ID	Set Oracle One-to-One Fulfillment Server for Correspondence functionality	Values are based on Oracle One-to-One Fulfillment server setup. After you have set the servers, all of those server IDs are available.	IGS_CO_FUL_SERVER_ID	Site	Required if using Correspondence print functionality
IGS: Generate Curriculum ID	Set generate curriculum IDs to automatically assign curriculum IDs	Default value is No. Values include Yes and No. When set to No, curriculum IDs are manually generated. When set to Yes, curriculum IDs are automatically generated.	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Generate User Name Automatically	Set to generate user name automatically	<p>Default value is No. Values include Yes and No.</p> <p>When set to No, user names are not automatically generated.</p> <p>When set to Yes, user names are automatically generated.</p>	IGS_PE_GENERATE_USER	Site	Required
IGS: Hold UCAS Transactions	Set to control the automatic setting of the hold flag on new transactions	<p>When set to Y, then the UCAS transactions are created with the hold flag set to Y. The hold flag must be released before the transactions can be sent to UCAS.</p> <p>Only users with the profile option not set to Y can release transactions that are on hold.</p>	IGS_HOLD_UCAS_TX	Site Application Responsibility User	Optional
IGS: Indicates whether Scheduling Software is installed	Set to indicate whether scheduling software is installed	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, scheduling software installed at institution.</p> <p>When set to No, scheduling software is not installed at institution.</p>	None	Site Application	Optional
IGS: Input Tax File Path	Set to input tax file path	There are no values.	None	Site Application	Optional

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Institution Grading Scale	Set to automatically convert applicant grade point averages entered in Academic History window to preferred institutional grading scale	<p>Enter the grading scale used by institution.</p> <p>Values include 4 Point, A-F, and 100 Point.</p> <p>When set to 4 Point, the grading scale is A = 4 points, B = 3 points, C = 2 points, D = 1 point, and F = 0 points.</p> <p>When set to A-F, grading scale is A, B, C, D, F.</p> <p>When set to 100 points, grades are given values from 100 to 0.</p> <p>This profile option is dependent on setup for grading scale types in the Grading Scale Types window.</p>	IGS_AD_INST_GRADING_SCALE	Site	Required
IGS: JTF Outcome	Set to determine the outcome of an interaction between prospective student and recruiter; for example, collateral material	Values are seeded values stored	None	Site Application	Required
IGS: JTF Reason	Set to determine the reason for initiation of interaction between prospective student and recruiter; for example, Inquiry	Values are seeded values stored	None	Site Application	Required
IGS: JTF Resource	Set to determine the recruiters	Values are salespersons set and stored	None	Site Application	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: JTF Result	Set to determine the result of interaction; for example, Applying to Institution	Values are seeded values stored	None	Site Application	Required
IGS: Language Code	Set language code	Default is American English. Values include all languages. If US institution, set to American English. This information defaults into the Languages tab on the Person Statistics window.	IGS_PE_LANGUAG E_CODE	Site	Required
IGS: Mask Credit Card Number	Set to mask credit card number in self-service	Default value is No making. Values include Mask - First four digits visible, Mask - Last four digits visible, and No masking. Enter the value that describes the preferred masking option. Most institutions will likely mask all but the last four digits visible.	None	Site	Optional
IGS: Merchant Reference	Set payee ID	Default value is SF Merchant. There are no other values. This profile option is dependent on Oracle iPayment setup.	None	Site Application	Required if using Oracle iPayment

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Number of Days Since Last Verification	Set the number of days since last user information verification in self-service	Enter the number of days between self-service users are prompted to verify their information.	IGS_PE_VERIFY_INT	Site	Required; if IGS: Student Verification Mode = At Least X Number of Days Since Last Verification
IGS: Participate in US Financial Aid Program	Set to indicate if the school participates in U.S. government Financial Aid programs.	<p>Values include Yes and No.</p> <p>When set to Yes, this will enable the Financial Aid Program Types attribute in Program Types IGSPS001. Financial Aid Program</p> <p>Types are used in Academic History to determine if the student has a prior bachelor's degree.</p> <p>When set to No, the Financial Aid Program Types attribute in Program Types IGSPS001 is disabled.</p>	IGS_PS_PARTICIPATE_FA_PROG	Site	Required to participate in U.S. student financial aid programs
IGS: Path of file where export data will be stored	Set path of file where export data will be stored	Enter the export data file's path.	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Person Catalog	Set person catalog	<p>The Person Catalog field on the General tab on the Person Statistics window will initially be populated by either the initial admittance term, the matriculation term, or the most recent admittance term.</p> <p>This profile option initially sets the Matriculation Term field on the General tab of the Person Statistics window after enrolling in either non-generic programs or both generic and non-generic programs.</p> <p>Default value is Matriculation Term.</p> <p>Values include Initial Admittance Term, Matriculation Term, and Most Recent Admittance Term.</p>	IGS_PE_CATALOG	Site	Required
IGS: Person Matriculation Term	Set person matriculation term	<p>Default value is Non-Generic Programs.</p> <p>Values include Non-Generic Programs and Both Non-Generic and Generic Programs.</p>	IGS_PE_MATR_TERM	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Person Most Recent Admittance Term	Set person most recent admittance term	<p>Default value is Accepted Application Offer Only.</p> <p>Values include Accepted Application Offer Only and Accepted Application Offer and Enrolled Unit Attempts.</p> <p>This profile option initially sets the value on the Most Recent Admittance Term field on the General tab of the Person Statistics window. This will be populated during Admissions based on the option selected.</p>	IGS_PE_RECENT_TERM	Site	Required
IGS: Person Query Address Usage	Set to person address	Select an address usage. Address usages are extensible, which means that you can add values.	None	Site	Required
IGS: Pre-enrollment Year	Set pre-enrollment year	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, year of program functionality is enabled.</p> <p>When set to No, year of program functionality is not enabled.</p>	IGS_PS_PRENRL_YEAR_IND	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Printer Destination Name	Destination name used by delivery method type Set for correspondence print functionality	Select the printer name that is set in the RightFax server.	IGS_CO_DESTINATION_NAME	Site Application Responsibility User	Required if using Correspondence print functionality
IGS: Remit To Address Usage	Set remit to address	Select an address usage. Address usages are extensible, which means that you can add values.	None	Site	Required
IGS: Residency Class	Set residency class User-defined residency detail codes must be set up prior to setting this profile option.	Enter a user-defined value. This value defaults into the Residency tab on the Residency/Citizenship Details window. Residency classes are defined as values for lookup type PE_RES_CLASS.	IGS_FL_RES_CLASS_ID	Site Application Responsibility User	Required
IGS: Self Service Administrator	Set self-service administrator information	Values include FND user names. This profile option is dependent on user definition. This must be set up to support new user and forgotten password functionality. This profile option is only needed if you want notifications to be sent if there is a failure during the New User Registration/Forgot Password process.	IGS_PE_USER_ADMIN	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: SEVIS Debug Option	Set to produce report of all errors in the IGS: SEVIS Exchange Visitor Batch concurrent process and IGS: SEVIS Non-Immigrant Batch Process concurrent process to assist DBAs or system administrators with debugging.	<p>Values include Yes and No.</p> <p>When set to Yes, the error report is generated and produced.</p> <p>When set to No, the error report is generated but not produced.</p>	None	Site	Optional
IGS: Student and Exchange Visitor Information System Enabled	Set to indicate if SEVIS functionality is enabled at your institution	<p>Values include Yes and No.</p> <p>When set to Yes, SEVIS functionality is enabled.</p> <p>When set to No, SEVIS functionality is not enabled.</p>	None	Site	Required for SEVIS reporting
IGS: Special Permission Required to Update Credit Points and Grading	Indicate if special permission is required to update credit points and grading	<p>Default value is No. Values include Yes and No.</p> <p>When set to No, special permission is not required to update credit points and grading.</p> <p>When set to Yes, special permission is required to update credit points and grading.</p>	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Student Finance Pay Refund Voucher Alone	Pay refund vouchers alone or separately in Oracle Payables	<p>Values include Yes and No.</p> <p>If set to yes, the Transfer Refunds to Oracle Payables concurrent process pays the refund vouchers for a party in one payment.</p> <p>If set to No, the Transfer Refunds to Oracle Payables concurrent process pays the refund vouchers for a party in separate payments.</p>	IGS_FI_PAY_RFND_VOUCHER	Site	Required
IGS: Student Information Verify Mode	Set to prompt student self-service users to verify information	<p>Enter the time interval in which a person must verify their personal information in self-service.</p> <p>Default value is Every Sign On.</p> <p>Values include At least X number of days since last verification, Every Sign On, and First Sign On Each Academic Term.</p>	IGS_PE_VERIFY_MODE	Site	Required
IGS: Supplier Name	Derive supplier name for party type person for supplier creation in Oracle Payables	<p>Values include Last Name, First Name and First Name Last Name.</p> <p>Set to indicate how you want to create the supplier name in Oracle Payables</p>	IGS_FI_SUPPLIER_NAME	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Supplier Number	Derive supplier number to create supplier in Oracle Payables	Values include Party Number and PERSON_ID_TYPE column values from the IGS_PE_PERSON_ID_TYP table Set to indicate how you want to create supplier numbers in Oracle Payables	IGS_FI_SUPPLIER_NUMBER	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Unit Section Enrollment Method Types	Set unit section enrollment method types	<p>Enter the method for which users can enroll in unit sections.</p> <p>Default value is Self Service Enrollment.</p> <p>Values include Self Service and Interactive Voice Response Enrollment, Interactive Voice Response Enrollment, and Self Service Enrollment.</p> <p>When set to Self Service and Interactive Voice Response, unit section enrollment is available in both self-service and interactive voice response.</p> <p>When set to Interactive Voice Response Enrollment, unit section enrollment is available in interactive voice response.</p> <p>When set to Self Service Enrollment, unit section enrollment is available in self-service.</p> <p>Interactive Voice Response Enrollment is not supported.</p>	None	Site	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: Use Funds Authorization	Set to enable the institution / site to use funds authorization	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, the site can use funds authorization.</p> <p>When set to No, the site cannot use funds authorization.</p>	FUND_AUTHORIZATION	Site	Required
IGS: Validate Timeslots	Set to validate timeslots	<p>Default value is Start Time Only. Values include Start Time Only and Start Time through End Time.</p> <p>When set to Start Time Only, users can enroll from the start of their assigned timeslot until the census date.</p> <p>When set to Start Time through End Time, users can enroll only from the start to the end of their timeslots.</p>	None	Site	Required
IGS: Workflow Enable	Set to enable Oracle Workflow	<p>Default value is Yes. Values include Yes and No.</p> <p>When set to Yes, Oracle Workflow is enabled.</p> <p>When set to No, Oracle Workflow is not enabled.</p>	IGS_WF_ENABLE	Site	Required if using Oracle Workflow
IGS: XML Degree Audit name space for Outbound XML	Set to identify XML name space for Degree Audit Outbound XML	Set to identify XML name space for Degree Audit Outbound XML	None	Site	Required if using Degree Audit

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
IGS: XML Degree Audit W3C URI	Set to identify WC3 XML Schema Standards	Set to identify WC3 XML Schema Standards	None	Site	Required if using Degree Audit
IGS: XML Degree Audit schema location for Degree Audit Outbound XML	Set to identify schema location for Degree Audit Outbound XML	Set to identify schema location for Degree Audit Outbound XML	None	Site	Required if using Degree Audit
HZ: Generate Contact Number	Generate contact number	Set to Yes to enable integration with Oracle Trading Community Architecture	None	Site Application Responsibility	NA

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
HZ: Generate Party Number	Generate unique identifier for person IDs and organizational unit IDs	<p>When HZ: Generate Party Number is set to Yes then the Institution Code, Organizational Unit Code, and Person Number will be assigned a sequence generated number. By setting the profile option to yes, all three codes are affected. It is not possible to have the Person Number to be assigned the sequence generated number and the Organizational Unit Code/Institution Code to be manually assigned a value concurrently.</p> <p>When HZ: Generate Party Number is set to No, the person numbers, organization unit codes, and institution codes must be manually entered (no sequence generated number).</p>	None	Site User Application Responsibility	<p>Required for self service application and the Self-Service New User Registration Process.</p> <p>For the New User Self-Service Registration Process, the profile option must be set at the site level.</p>
HZ:Generate Party Site Number	Generate unique identifier for party site number	Set to Yes to enable integration with Oracle Trading Community Architecture	None	Site Application Responsibility	Required

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
MO: Operating Unit	Set for responsibilities created for recruiting	Valid value is operating unit If multiple organization support is enabled, profile option must be set for any responsibilities that are used or created for recruiting. Sales Online transfers information to Receivables and the organization must be set to accurately transfer accounting information.	None	Site	Required
OS: Default Channel for Lead Selection Engine	Set the default channel for leads	Default channel for leads	None	Site	Required if using Recruiting
OS: Default Sales Channel	Set default sales channel for new opportunities	Default sales channel for new opportunities	None	Site	Required if using Recruiting
OS: Opportunity Sales Team Default Role Type	Set the default role type	Valid values include default role type Institutions may want to set the default role type to Recruiter at the Site level. However, this depends on the implementation.	None	Site	Required if using Recruiting
OS: Sales Lead Access Privilege	Set to control the level of access to lead information	Valid values include Full, Prospecting, and Sales Team	None	Site	Required if using Recruiting

Table B–1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
OS: Sales channel required	Set to determine if sales channel required	When set to Y, you are required to enter a sales channel for a lead before that lead can be qualified. This does not apply to opportunities.	None	Site	Required if using Recruiting
OS: Sales Opportunity Access Privilege	Set to control the level of access to opportunity information	Valid values include Org Full, Global Full, Prospecting, and Sales Team	None	Site	Required if using Recruiting
OTS: Default Party Type	Set the default party type	Valid values include Organization or Person Default value is Organization Typically higher education institutions should set this profile option to Person	None	Site	Required if using Recruiting
OTS: Default Relationship	Set the default relationship	Set to Contact Of Higher education institutions may want to create their own relationships and select a user-defined relationship as the default relationship.	None	Site	Required if using Recruiting
OTS: Enable Address Validation	Set to Yes to enforce address validation	Valid values include Yes and No. When set to Yes, address validation is enforced. When set to No, address validation is not enforced.	None	Site	Required if using Recruiting

Table B-1 (Cont.) Profile Options

Profile Option Name	Feature	Description	Internal Name	Level	Req or Optional
OTS: Interaction Default Outcome	Set default outcome	Enables institutions to set a default common desired outcome such as Prospect Contacted	None	Site	Required if using Recruiting
OTS: Sales Online Interaction Enabled	Set to enable online interaction	Valid values include Yes and No. When set to Yes, interactions are recorded. When set to No, interactions are not recorded. The profile option cannot be set to Yes until a campaign is activated.	None	Site	Required if using Recruiting
OTS: Max Interactions Displayed	Sets number of interactions that can be displayed on a record	Default value is 10. Institutions may want to have more or less interaction records displayed.	None	Site	Required if using Recruiting

C.1 Overview

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

Workflow features include the following:

- Oracle Workflow Builder, a graphical tool that lets users create business process definitions
- Workflow Engine, which implements process definitions at runtime
- Notification System, which sends notifications and processes responses in a workflow

Workflow functionality in Oracle Student System allows users to automatically route information to users throughout an institution, and to deliver notifications to users regarding issues needing their attention or processes that have been completed.

You must install and run Oracle Workflow to use Oracle workflows.

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

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

Most Oracle Student System business events are enabled by default. The exceptions are:

- `oracle.apps.igs.pe.rescal.ac`

- oracle.apps.igs.pe.rescal.ai
- oracle.apps.igs.pe.rescal.io
- oracle.apps.igs.pe.rescal.os
- oracle.apps.igs.pe.rescal.ss

There is no Generate Function Name for any Oracle Student System business event. The Owner Name for all workflows and business events is **Oracle Student System** unless otherwise indicated. The Owner Tag for all workflows and business events is **IGS** unless otherwise indicated.

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

C.2 Program Structure and Planning

Program Structure and Planning workflows provide a method to notify users when setup is modified.

C.2.1 Workflows

The following table describes workflows in Program Structure and Planning.

Table C–1 Workflow for Program Structure and Planning

Workflow	Business Event	Item Type	Description
None	oracle.apps.ps.fac_workload.exceed	OSS: Staff Exceeded notification	Triggered when staff exceeds expected workload

C.2.1.1 Exceed Workload Workflow

The Exceed Workload workflow allows you to get notification when a staff member exceeds expected workload.

C.2.2 Business Events

The following table describes business events in Program Structure and Planning.

Table C–2 Business Events for Program Structure and Planning

Business Event	Item Type	Description
oracle.apps.igs.ps.wfus_md	IGSSWTST /Main_ Process	Triggered when users change values of Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, Start_Time, End_Time, Building_Code, Room_Code, Instructor_Id in the Unit Section Occurrences window; can be set up to notify users when a unit section occurrence is changed
oracle.apps.igs.pf.wfus_cn	IGSSWTST /Main_ Process	Triggered when users change the status of a unit section to Cancel in the Unit Section Details window; makes necessary changes in scheduling; can be set up to notify users when a unit section is cancelled

C.3 Person

Use the Person workflows to set up notifications to Oracle Student System users.

C.3.1 Workflows

The following table describes workflows in Person.

Table C–3 Workflows for Person

Workflow	Business Event	Item Type	Description
IGSPE001.wft	oracle.apps.igs.pe.residency_change	Residency Change IGS_PE_RES_CHG	Triggered by oracle.apps.igs.pe.residency_change business event Note: Workflow notification will be sent to the system administrator by default.

Table C–3 (Cont.) Workflows for Person

Workflow	Business Event	Item Type	Description
IGSPE002.wft	Oracle Trading Community Architecture business event	Address Change IGS_PE_ADDR_CHG	Triggered when subscribed from a Oracle Trading Community Architecture business event. Notification provides old and new values for an updated address record. Use Oracle Trading Community Architecture business event for creation or update of a Party Site and Location to route Address Change workflow to a designated person. Note: Workflow notification will be sent to the system administrator by default.
igs_generate_user.wft	None	IGS generate new user IGSPEGEN	Triggered when a user attempts the new user registration in self service; self service administrative users can approve or reject the creation of a person Note: Profile option IGS: Approval for Person Creation must be set to Yes and profile option IGS: Approver of Person Creation must have a user id assigned.
IGSPE003.wft	oracle.apps.igs.pe.exthold	Set or Release External Hold	Triggered by third party software to apply or release an external hold; used in conjunction with the Set or Release external hold workflow

C.3.1.1 Residency Change Workflow

Note: In order for the notification to be sent to the designated user, the username SYSADMIN must be an active account with a valid email address.

The following table describes Residency Change workflow activities.

Table C–4 Residency Change Workflow Activities

Activity Name	Activity Description	Customizable	Required
Mail Notification Process/Start	Starts process when residency status is changed	No	Y

Table C–4 (Cont.) Residency Change Workflow Activities

Activity Name	Activity Description	Customizable	Required
Mail Notification Process/Notify User	Sends notification to responsible person that a residency status change has occurred	Institutions can create new messages for notification activities. Institutions can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.	Y
Mail Notification Process/End	Ends process	No	Y

C.3.1.2 Address Change Workflow

Note: In order for the notification to be sent to the designated user, the user name SYSADMIN must be an active account with a valid email address.

The following table describes Address Change workflow activities.

Table C–5 Address Change Workflow Activities

Activity Name	Activity Description	Customizable	Required
Mail Notification/Start	Starts process when address is changed	No	Y
Mail Notification/Notify User	Sends notification to responsible person that a address change has occurred	Institutions can create new messages for notification activities. Institutions can create new notifications and notification activities, and modify the workflow process to accommodate these new activities.	Y
Mail Notification/End	Ends process	No	Y

C.3.1.3 Generate New User Workflow

Generate new self-service users.

The following table describes the Generate New User workflow activities.

Table C–6 Generate New User Workflow Activities

Activity Name	Activity Description	Customizable	Required
Start	This begins the workflow IGS generate new user.	No	Y
Check if Setup Complete	Verifies the Self Service Person Responsibility has mappings for all system person types to a self service responsibility.	No	Y
Setup error notification	If the setup is not complete then the Administrator will get a notification. Error notifications will be sent to the user defined in the profile option, IGS: Self Service Administrator.	Y	N
Compare Text	Verifies if the profile option, IGS: Approval Required for Person Creation is set 'Yes' or 'No.'	No	Y
Notification for Approval	If approval is required to create a person then notification is sent to the user based on the profile option, IGS: Approver of Person Creation.	Y	N
Check and create party	If approval is not needed to create a party then the fields in the New User Registration page are used for matching to an existing party in OSS. If a match is not found then a person is created in OSS. If an exact/partial match is found then a person is not created in OSS.	No	Y

Table C–6 (Cont.) Generate New User Workflow Activities

Activity Name	Activity Description	Customizable	Required
Compare text	Validates the profile option, IGS: Generate User Name Automatically	No	Y
IGS Generate User	If IGS: Generate User Name Automatically is set to 'Yes' then the business event, oracle.apps.igs.pe.genusr is called.	Yes. Institutions can attach their own function to generate their preferred user name for the requestor. OSS has provided a function as an example, IGS_PE_USERID_PKG.GENERATE_USERNAME	Y
Validate username	Username is verified for uniqueness. The username is either created from New User Registration page through manually entry or generated during the IGS Generate User activity. In addition, there is a validation if a person already exists in OSS and if the person has an existing username then a username is not created. If the person does not have a username and exists in OSS then a username is created.	No	Y
Create FND User	If the validate username is successful then the user name is created and stored.	No	Y
Duplicate User Name	If the validate username is not successful (user name is not unique) then a notification is sent to the administrator defined in the profile option, IGS: Self Service Administrator.	Y	N
Requestor's Notification of Approval	Send notification to Requestor if the username is successfully created.	Y	Y

Table C–6 (Cont.) Generate New User Workflow Activities

Activity Name	Activity Description	Customizable	Required
End	End of workflow.	No	Y

C.3.1.4 Set or Release a Hold Workflow

Your third party software or external system raises an Oracle Student System designated business event in Oracle Workflow in order to insert/update a hold type into Oracle Student System.

After the external system raises the Set or Release External Hold business event, the subscribed workflow process of Set or Release a Hold will trigger the following process flow:

1. The external hold information is received by Oracle Student System.
2. Oracle Student System determines if the hold is to be created or updated.
3. The internal validations are processed for the record to be created or updated.
4. If the process is successful, then the workflow process terminates.
5. If the process fails, then an administrator is sent an email notification with the error text.

In addition, a business event will be raised for the failed process. You can customize your own workflow process for this business event in order to resolve the error/failure.

The following table shows workflow and business event parameters for the Set or Release of External Hold functionality.

Table C–7 Set or Release External Hold Parameters

Workflow / Business Event	Parameter	In / Out	Mandatory / Optional
Set of Release of External Hold IGSPE003.wft	Person Number	In	M
Set of Release of External Hold IGSPE003.wft	Hold Type	In	M
Set of Release of External Hold IGSPE003.wft	Start Date	In	M
Set of Release of External Hold IGSPE003.wft	External Reference	In	M

Table C–7 (Cont.) Set or Release External Hold Parameters

Workflow / Business Event	Parameter	In / Out	Mandatory / Optional
Set of Release of External Hold IGSPE003.wft	Admin User to Notify	In	M
Set of Release of External Hold IGSPE003.wft	Person Name	Out	None
Set of Release of External Hold IGSPE003.wft	Error	Out	None
Set of Release of External Hold IGSPE003.wft	Expiration Date	In	O
oracle.apps.igs.pe.extholdfl	P_PERSON_NUMBER	Out	None
oracle.apps.igs.pe.extholdfl	P_HOLD_TYPE	Out	None
oracle.apps.igs.pe.extholdfl	P_START_DT	Out	None
oracle.apps.igs.pe.extholdfl	P_END_DT	Out	None
oracle.apps.igs.pe.extholdfl	P_ERROR	Out	None
oracle.apps.igs.pe.extholdfl			None
oracle.apps.igs.pe.extholdss	P_PERSON_NUMBER	Out	None
oracle.apps.igs.pe.extholdss	P_HOLD_TYPE	Out	None
oracle.apps.igs.pe.extholdss	P_START_DT	Out	None
oracle.apps.igs.pe.extholdss	P_END_DT	Out	None

The following table describes Set or Release External Hold workflow activities.

Table C–8 Set or Release External Hold Workflow Activities

Activity Name	Activity Description	Customizable	Required
Receive	Raise the Set or Release External Hold business event, oracle.apps.igs.pe.exthold. This business event notifies OSS to start processing an external hold.	Y	Y

Table C–8 (Cont.) Set or Release External Hold Workflow Activities

Activity Name	Activity Description	Customizable	Required
Process Holds	The external hold is processed within OSS by either setting or releasing the hold against the specified person.	No	Y
Notify Process Hold Failure	A specified administrator will be notified if the process holds fails.	Y	N
Raise	<p>The business event raised here depends if the Process Holds has failed or not.</p> <p>If the Process Holds activity fails then the business event, oracle.apps.igs.pe.extholdfl is raised.</p> <p>If the Process Holds activity is successful then the business event, oracle.apps.igs.pe.extholdss is raised.</p>	Y	N
End	The end of the Set or Release External Hold workflow process.	No	Y

C.3.2 Business Events

The following table describes business events in Person.

Table C–9 Business Events for Person

Business Event	Item Type	Description
oracle.apps.igs.pe.rescal.ac	Admission Application Creation event	Triggered when an application is created; can be used by institutions to create a user-defined process to calculate residency status
oracle.apps.igs.pe.rescal.ai	Admission Application Import event	Triggered when an application is imported from an external source such as the common application; can be used by institutions to create a user-defined process to calculate residency status
oracle.apps.igs.pe.rescal.io	Admission Application Import Outcome Decision event	Triggered when an application’s outcome decision is imported; can be used by institutions to create a user-defined process to calculate residency status

Table C–9 (Cont.) Business Events for Person

Business Event	Item Type	Description
oracle.apps.igs.pe.rescal. os	Admission Outcome Status Update event	Triggered when an application outcome status is updated; can be used to create a user-defined process to calculate residency status; includes parameters to be used for workflow notifications
oracle.apps.igs.pe.rescal. ss	Admission Self Service Application Creation event	Triggered when an application is submitted through self service; can be used by institutions to create a user-defined process to calculate residency status
oracle.apps.igs.pe.genus r	Generate user name	Triggered when a user attempts the new user registration process in self service; can be used by institutions in conjunction with the Generate User name workflow to create a user name for a person to login through self service
oracle.apps.igs.sv.ev.rece ive	SEVIS Exchange Visitor Request Processed	Triggered when concurrent process for Exchange Visitor is submitted. Processes SEVIS data
oracle.apps.igs.sv.ev.sub mit	Submit Exchange Visitor Batch Request	Triggered when concurrent process for Exchange Visitor is submitted. Generates and sends Exchange visitor XML file
oracle.apps.igs.sv.ni.rece ive	SEVIS Non Immigrant Request Processed	Triggered when concurrent process for Non Immigrant is submitted. Processes SEVIS data
oracle.apps.igs.sv.ni.sub mit	Submit Non Immigrant Batch Request	Triggered when concurrent process for Non Immigrant is submitted. Generates and sends Non Immigrant XML file
oracle.apps.igs.pe.exthol dfl	NA	Triggered by Oracle Student System to inform the external system that set or release external hold has failed. The external system can catch this event and continue further processing
oracle.apps.igs.pe.exthol dss	NA	Triggered by Oracle Student System to inform the external system that set or release of external hold has been successful. The external system can catch this even and continue further processing.

Note: All business events in Person are disabled except oracle.apps.igs.pe.genusr.

C.4 Admissions

Use admissions workflows to communicate with students, faculty, and staff.

C.4.1 Workflows

The following table describes workflows in Admissions.

Table C–10 Workflows in Admissions

Workflow	Business Event	Item Type	Description
ADAPPLIN/ P_ INCMPLAP PL	oracle.apps.igs.ad .appl.incmpl.appl	Incomplete Applications Notification	Triggered by running the Incomplete Applications concurrent process for applicants with incomplete self-service applications; notifies prospective applicants that they have started an application and have not yet submitted the application to the institution
ADPADMR Q/P_PST_ ADMRQ	oracle.apps.igs.ad .addl.post_adm_ req	Post Admissions Requirements Notifications	Triggered by running the Send Notifications for Admission and Post Admission Requirements concurrent process; notifies students that requirements are needed before the application can be processed
ADADMRE Q/P_ ADMREQ	oracle.apps.igs.ad .appl.adm_req	Admission Requirements Notification	Triggered by running the Admission Requirements concurrent process; notifies applicants that requirements are needed before the application can be processed
Notify Evaluators About Unevaluated Applications	oracle.apps.igs.ad .eval_apl	Evaluator Notifications for Ratings	Notifies evaluators that applications are ready to be reviewed
Outcome Status Workflow	oracle.apps.igs.pe .rescal.os	Outcome Status Workflow	Triggered when outcome status is changed and saved
Admission Offer Single Response Workflow Notification	oracle.apps.igs.ad .singleresponse.c hanged	Admission Enforce Single Response Notification	Triggered when Offer Response Status Change business event is raised and you are enforcing single response
Admission Offer Response Workflow Notification	oracle.apps.igs.ad .offerresponse.ch anged	Admission Offer Response Status Change Notification	Triggered when Offer Response Status Change business event is raised
Academic Index Workflow	oracle.apps.igs.ad .acadindex.chang ed	Academic Index	Triggered when Academic Index business event is raised

C.4.1.1 Incomplete Applications Workflow

The Incomplete Applications business event is raised for the applicant or applicants with incomplete self-service applications. A sample Incomplete Applications workflow is triggered by the new business event. You can update this sample workflow.

The Incomplete Applications workflow notification will be sent as both an email message to the applicant, and as a notification in the Applicant Home page.

An applicant may have multiple incomplete applications. One email message should be sent for every time the workflow is initiated by the concurrent manager request, regardless of the number of incomplete applications the applicant may have. The workflow process may be initiated multiple times within a single period.

C.4.1.2 Admissions Requirements Workflow

The Admissions Requirements workflow notifies applicants that there are additional documents or missing items that are needed to complete the application.

C.4.1.3 Post Admission Requirements Workflow

The Post Admission Requirements workflow allows administrative users to notify applicants of the additional documents or missing items that are required by the institution even after the admission application process is complete.

C.4.1.4 Notify Evaluators About Unevaluated Applications

The Notify Evaluators About Unevaluated Applications workflow allows administrative users to notify application reviewers about applications that are complete and are ready for review.

C.4.1.5 Outcome Status Workflow

A notification is sent to users alerting them to the change in the outcome status.

C.4.1.6 Admission Enforce Single Response Notification

When an offer response is recorded, the Offer Response Status business event is raised. The Admission Enforce Single Response Notification is sent when the offer response status is Accepted and the admission period category is set for single response. The workflow notification is sent to all applications instances for the person that is using an admission period category that is set for single response.

C.4.1.7 Admission Offer Response Status Change Notification

When an offer response is recorded, the Offer Response Status business event is raised. The Admission Offer Response Status Change workflow notification is sent every time the offer response status changes for an application instance.

C.4.1.8 Academic Index

A notification is sent to the subscriber alerting them to a change in the Academic Index. The user can then use this information to make decisions about admission applications.

C.4.2 Business Events

The following table describes the business events in Admissions.

Table C–11 Business Events for Admissions

Business Event	Item Type	Description
oracle.apps.igs.ad.acadindex.changed	Outcome Status Change	Triggered when outcome status is changed and saved
oracle.apps.igs.ad.acadindex.changed	Academic Index Business Event	Triggered when academic index is changed
oracle.apps.igs.ad.appl_mult_trns	Transcript Business Event	Triggered when a transcript is entered for a person

C.5 Financial Aid

Financial Aid workflows are notifications to users and students to help with critical financial aid processing actions. The Owner Tag for the Financial Aid workflows and business events is **IGF**.

C.5.1 Workflows

The following describes workflows in Financial Aid.

Table C–12 Workflows for Financial Aid

Workflow	Business Event	Item Type	Description
IGFSLW01. wft	None	DLPNA	Triggered by Promissory Note Acknowledgement Process concurrent process which is part of the request set Direct Loan > Upload Promissory Note Acknowledgement; triggered if Loan's promissory note is rejected by the external processing agency
IGFAPW01. wft	Not used	Load ISIR Records	Not used
IGFAPW02. wft	Not used	Notify Changes in Student Information	Not used
IGFAPW03. wft	Not used	TSTAPPS	Not used
IGFAPW04. wft	None	Corrections Not Initiated by School	Triggered by the ISIR Import Process concurrent process; notifies users when an ISIR correction record is received which the school did not initiate
IGFAPW05. wft	None	OSSDTLS	Not Used
IGFSEW01. wft	None	Student Employment Notification	Triggered by Student Employment Upload Payroll Information concurrent process and payroll details of the Student Work Award Progress window; notifies users if the amount resulting from the subtraction of the amount of a student's work study award from the student's gross pay is within the threshold level

C.6 Enrollment

These workflows are designed to alert when enrollment-related events occur.

C.6.1 Workflows

The following describes workflows in Enrollment.

Table C–13 Workflows for Enrollment

Workflow	Business Event	Item Type	Description
IGSEN002.wft	oracle.apps.igs.en.p rog.intrmn	OSS: Notify Student About Intermission	Triggered when intermission is committed or when an intermission that requires approval is committed or committed and approved; notifies students and administrators of intermission and intermission changes
IGSEN003.wft	oracle.apps.igs.en.p rog.transfer	OSS: Notify Program Transfer Details	Triggered when a program transfer is committed (when the transfer itself is committed, whether or not the units or unit sections are transferred as part of the program transfer); notifies students and administrators of program transfer changes Note: This is not triggered if unit attempts or unit set attempts are transferred later in a separate transaction.
IGSEN004.wft	oracle.apps.igs.en.p gofop.update	OSS: Notify Student Program Offering	Triggered when a program offering option is changed. This occurs when an administrator commits the change for a program offering option - for example, the administrator could use the Program Change button on the IGSEN022 window to change and commit the change of a program offering option; notifies students and administrators of changes to program offering options
IGSEN005.wft	oracle.apps.igs.en.p rog.discon	OSS: Notify Student for Program Discontinuation	Triggered when a program attempt is discontinued. The discontinuation can occur as the result of Discontinuation in Enrollment, as the result of transferring from a secondary program to a new primary program, or as the result of a progression outcome from progression; notifies students and administrators of program discontinuation This workflow is asynchronous.
IGSRE001.wft	oracle.apps.igs.re.re stop.update	OSS: Research Topic Modification	Triggered when a research topic is entered, changed, or approved; notifies students and administrators of changes to research topics
IGSRE002.wft	oracle.apps.igs.re.th esis.update	OSS: Thesis topic creation	Triggered when a thesis topic or title is entered, changed, or approved. This occurs when an administrator enters or changes the information for the thesis topic or title and saves the changes; notifies students and administrators of changes to thesis topics

Table C–13 (Cont.) Workflows for Enrollment

Workflow	Business Event	Item Type	Description
IGSRE003.wft	oracle.apps.igs.re.sp rvsn.update	OSS: Change in Supervisor Attribute	<p>Triggered when a supervisor is assigned to a research candidacy or when attributes of candidacy's supervision change.</p> <p>These attributes are the Person Number, Start Date, End Date, Supervised%, Supervisor Type, Organizational Unit, or Replaced Person Number; notifies students and administrators of supervisors</p>
IGSRE004.wft	oracle.apps.igs.re.su bm.overdue	OSS: Check overdue submission	<p>Triggered when a submission is overdue (the students goes beyond the maximum submission date without submitting the work and the status of the thesis is still PENDING); notifies students and administrators of an overdue submission date</p>
IGSRE005.wft	oracle.apps.igs.re.mi lestone.change	Milestone	<p>Triggered when the Milestone business event is raised; notifies the student, the active students' supervisors, and an administrator of additions and changes to milestone information for the research candidacy.</p>
IGSRE006.wft	oracle.apps.igs.re.mi lestone.notify	Milestone Notification	<p>Triggered when the Milestone Notification business event is raised; notifies the student, the active students' supervisors, and an administrator of additions and changes to milestone notification information for the research candidacy.</p>
IGSRE007.wft	oracle.apps.igs.re.re gistration.confirm	Confirmation of Registration	<p>Triggered when the Confirmation of Registration business event is raised; notifies the student, the students' supervisors, and an administrator of registration of student for the research candidacy.</p>
IGSRE008.wft	oracle.apps.igs.re.th esis.examsub	Thesis Exam	<p>Triggered when the Thesis Exam business event is raised; notifies the student, the students' supervisors, and an administrator when the thesis has been submitted or resubmitted for the research candidacy.</p>
IGSRE009.wft	oracle.apps.igs.re.th esis.resultupd	Thesis Result	<p>Triggered when the Thesis Result business event is raised; notifies the student, the students' supervisors, and an administrator of change in the thesis result for the research candidacy.</p>
IGSEN008.wft	oracle.apps.igs.en.p rog.keyprim	Key Program Change	<p>Triggered when oracle.apps.igs.en.prog.keyprim is raised; notifies an administrator when a student's key program changes.</p> <p>This workflow is asynchronous.</p>

C.6.1.1 OSS: Notify Student About Intermission

The OSS: Notify Student About Intermission workflow allows you to notify a student and approver that the intermission is updated.

C.6.1.2 OSS: Notify Program Transfer Details

The OSS: Notify Program Transfer Details allows you to notify a student that the transfer has taken place.

C.6.1.3 OSS: Notify Student Program Offering

The OSS: Notify Student Program Offering workflow allows you to notify a student and administrator that the program offering option for the student's program attempt is changed.

C.6.1.4 OSS: Notify Student for Program Discontinuation

The OSS: Notify Student for Program Discontinuation workflow allows you to notify a student that the program attempt is discontinued.

C.6.1.5 OSS: Research Topic Modification

The OSS: Research Topic Modification workflow allows you to notify students and administrators of changes to research topics.

C.6.1.6 OSS: Thesis Topic Creation

The OSS: Thesis Topic Creation workflow allows you to notify a student of the change to the thesis topic or title.

C.6.1.7 OSS: Change in Supervisor Attribute

The OSS: Change in Supervisor Attribute workflow allows you to notify a student, supervisors and an administrator of the changes.

C.6.1.8 OSS: Check Overdue Submission

The OSS: Check Overdue Submission workflow allows you to notify a student that thesis submission is overdue.

C.6.1.9 Milestone

The Milestone workflow allows you to notify the student, the active students' supervisors, and an administrator of additions and changes to milestone information for the research candidacy.

C.6.1.10 Milestone Notification

The Milestone Notification workflow notifies the student, the active students' supervisors, and an administrator of additions and changes to milestone notification information for the research candidacy.

By scheduling the Milestone Due Date concurrent process to run nightly, you can trigger notifications to students and supervisors based on the notification days associated with the milestone type. You can customize workflow so that different messages are passed to users based on specific parameters, for example, Attendance Type.

C.6.1.11 Confirmation of Registration

The Confirmation of Registration workflow notifies the student, the students' supervisors, and an administrator of registration of student for the research candidacy.

C.6.1.12 Thesis Exam

The Thesis Exam workflow notifies the student, the students' supervisors, and an administrator when the thesis has been submitted or resubmitted for the research candidacy.

C.6.1.13 Thesis Result

The Thesis Result workflow notifies the student, the students' supervisors, and an administrator of change in the thesis result for the research candidacy.

C.6.1.14 Key Program Change

The Key Program Change workflow notifies an administrative user when there is a change to the key program.

C.6.2 Business Events

The following table describes the business events in Enrollment.

Table C-14 Business Events for Enrollment

Business Event	Item Type	Description
oracle.apps.igs.en.wlst. mailadm	None	Triggered when waitlisted student fails enrollment eligibility validations during auto-enrollment; can be used by institutions to create a user-defined process to notify users of students who fail enrollment eligibility during the automatic enrollment process
oracle.apps.igs.en.wlst. mailstud	None	Triggered when waitlisted student passes enrollment eligibility validations during auto-enrollment; can be used by institutions to create a user-defined process to notify users of students who pass enrollment eligibility during the automatic enrollment process
oracle.apps.igs.en.infor m_stud	None	Triggered by any program attempted information is changed; can be used by institutions to create a user-defined process to notify users when any program attempt information is changed
oracle.apps.igs.en.enrp.s tatmail	None	Triggered by a change in unit attempt status; can be used by institutions to create a user-defined process to notify users when there is a change in unit attempt status
oracle.apps.igs.en.enrp.i nstresp	None	Triggered when an instructor submits response to an audit permission or special permission request; can be used by institutions to create a user-defined process to notify students of instructor's response to special permission requests
oracle.apps.igs.en.enrp.s tudreq	None	Triggered when a student submits and audit permission or special permission request; can be used by institutions to create a user-defined process to notify instructors of special permission requests
oracle.apps.igs.en.dropn otification	None	Triggered when the student's unit attempt status is changed to Dropped or Discontinued
oracle.apps.igs.en.dropn otification	None	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for an intermitted program
oracle.apps.igs.en.dropn otification	None	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for a discontinued program
oracle.apps.igs.en.dropn otification	None	Triggered when the unit attempt status for enrolled units changes to Dropped or Discontinued for a transferred program
oracle.apps.igs.en.transf ernotification	None	Triggered when a unit section is transferred
oracle.apps.igs.en_be_ en002	None	Triggered when a student is retrieved by the Minimum Credit Point Query window and the admin decides to notify the student

Table C–14 (Cont.) Business Events for Enrollment

Business Event	Item Type	Description
oracle.apps.igs.re.mileston e.change	Milestone	<p>Triggered when a milestone is created and saved against a candidacy, whether by defaulting all program milestones or by adding milestones on an ad hoc basis.</p> <p>The Milestone business event is raised when there are changes to the Milestone Type, Due Date, Milestone Status and Date Reached. If a planned milestone is deleted, the business event is raised as well.</p>
oracle.apps.igs.re.mileston e.notify	Milestone Notification	<p>Triggered when you indicate notification days. You can nominate three triggers for a notification:</p> <p>Imminent</p> <p>Reminder</p> <p>Re-Reminder</p>
oracle.apps.igs.re.registr ation.confirm	Confirmation of Registration	<p>Triggered when Research Candidacy is confirmed.</p> <p>Research Candidacy can be confirmed when pre-enrollment is triggered, from admission on acceptance of an offer. The candidacy may also be manually confirmed in the Program Attempt window.</p>
oracle.apps.igs.re.thesis. examsub	Thesis Exam	<p>Triggered when a thesis exam is submitted or on any further resubmission.</p> <p>You can notify the student, principal supervisor and the Thesis Panel Member.</p>
oracle.apps.igs.re.thesis. resultupd	Thesis Result	<p>Triggered when a thesis result is saved or updated.</p> <p>You can notify students of the outcome of an thesis exam, including referrals.</p>
oracle.apps.igs.en.prog. keyprim	Key Program Change	Triggered when a key program change occurs

C.7 Academic Records

Use these workflows to support the processing of records tasks such as advising, grading, ordering transcripts, and processing degree audit requests.

C.7.1 Workflows

The following describes workflows in Academic Records.

Table C–15 Workflows for Academic Records

Workflow	Business Event	Item Type	Description
IGSAS001.wft	oracle.apps.igs.as.infa dmcg	Change Grade Request Workflow	Triggered from the Review Change of Grade self service screen for final and early final periods; notifies user who initiated change of grade request; seeks resolution of change of grade request for final and early final grading period from lead instructor of the unit section
IGSAS002.wft	oracle.apps.igs.as.infa dmgrd	Grade Submission Notification	Triggered from the Review Enter Grade self service screen; notifies lead instructor of unit section that final grades for unit is submitted
IGSAS003.wft	oracle.apps.igs.as.infa dmattd	Attendance Submission Notification	Triggered from the Review Attendance self service screen; notifies lead instructor of unit section that attendance for unit section is submitted
IGSAS004.wft	None	OSS: Notify Admin About transcript production	Notify ADMIN About transcript production
IGSAS005.wft	oracle.apps.igs.as.be_ as004	OSS: Notify Student About Transcript production	Triggered when the system prints the academic records order placed by student
IGSAS007.wft	None	OSS: Notify About Missing Academic Record	Triggered when a transcript request by a student or administrator indicates missing academic records
IGSAS008.wft	oracle.apps.igs.as.ordd oc.notstu	OSS: Missing Academic Record Transcript Production	Triggered when an administrator manually updates the details of a completion date of a missing academic records transcript
IGSAS009.wft	oracle.apps.igs.as.Tran scriptReq.notify_hold	OSS: Notify students About transcript hold	Triggered when a transcript is requested by an administrator for a student who has a transcript hold
IGSDAWF3.wft	oracle.apps.igs.da.xml. reqsubm	Submit Request	Triggered by the Submit button on Review Request self-service page to signal the XML Gateway to begin processing the outbound request
IGSDAWF3.wft	oracle.apps.igs.da.xml. receive	Receive Reply	Triggered on receipt of a reply from the degree audit trading partner. This workflow is asynchronous.

Table C–15 (Cont.) Workflows for Academic Records

Workflow	Business Event	Item Type	Description
IGSDAWF3. wft	oracle.apps.igs.da.xml. rcverr	Receive Error	Triggered on error in receipt of a reply from the degree audit trading partner. This workflow is asynchronous.
NA	oracle.apps.igs.as.aigr drel	Inform Instructor about Assessment Item Grades Release to Student	Triggered by business event
NA	oracle.apps.igs.as.usgr dsub	Inform Instructor That Unit Section Grades Have Been Submitted	Triggered by business event
IGSAV001	oracle.apps.igs.av.vali date_transcript	Saved Transcript	Triggered by business event

C.7.1.1 Change Grade Request Workflow

The Change Grade Request Workflow notifies user who initiated change of grade request and seeks resolution of change of grade request for final and early final grading period from lead instructor of the unit section.

The following table describes the Change Grade Request workflow activities.

Table C–16 Change Grade Request Workflow Activities

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. Change Grade Request workflow is launched by oracle.apps.igs.as.infadmchg business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes

Table C-16 (Cont.) Change Grade Request Workflow Activities

Activity Name	Activity Description	Customizable	Required
Select Approver	Select the lead instructor of the unit section	Yes. Institutions are encouraged to modify the activity to suit their respective hierarchy of approval.	Yes
Notify Approver	Sends email to the selected Approver, seeking his/her decision of the proposed change of grade	Yes. Institutions may choose to modify the text of the message.	Yes
Approve Request	Contains complex logic to ensure that the following tasks are accomplished: <ul style="list-style-type: none"> ■ Repeat Processing ■ Grade Translation ■ Finalization of Grade 	No. Contains complex logic and should not be modified.	Yes
Repeat Process Notification Error Notification	Sends informative notifications to the Requestor of the workflow informing them that an error has occurred while executing the Approve Request activity	Yes. Institutions may choose to modify the text of the message.	No
Notify Requestor Approve	Notifies the requestor that the change of grade request has been approved.	Yes. Institutions may choose to modify the text of the message.	No
Reject Request	Contains complex logic to update relevant tables to put the rejected change of grade request into effect	No. Contains complex logic and should not be modified.	Yes
Notify Requestor Reject	Notifies the requestor that the change of grade request has been rejected.	Yes. Institutions may choose to modify the text of the message.	No
Request Information	Allows the approver to enter the details of additional information sought by him/her	Yes. Institutions may choose to modify the text of the message.	No

Table C–16 (Cont.) Change Grade Request Workflow Activities

Activity Name	Activity Description	Customizable	Required
Notify Requestor MI	Notifies instructors requesting for more information	Yes. Institutions may choose to modify the text of the message.	No
Approver Error	Sends informative notifications to the Requestor of the workflow informing them that an error has occurred while trying to select an Approver	Yes. Institutions may choose to modify the text of the message.	Yes
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.2 Grade Submission Workflow

The Grade Submission Notification workflow notifies lead instructor of unit section that final grades for unit are submitted.

Institutions are allowed to only customize the SELECT_APPROVER process of the Grade Submission and Change of Grade workflows to satisfy their specific needs. The remaining steps of the workflow must remain unchanged.

The following table describes the Grade Submission workflow activities.

Table C–17 Grade Submission Workflow Activities

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. Grade submission workflow is launched by oracle.apps.igs.as.infadmgrd business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes
Select Approver	Select the lead instructor of the unit section.	Yes. Institutions are encouraged to modify the activity to suit their respective hierarchy of approval.	Yes

Table C–17 (Cont.) Grade Submission Workflow Activities

Activity Name	Activity Description	Customizable	Required
Repeat Process	Contains complex logic to ensure that the following tasks are accomplished: <ul style="list-style-type: none"> ■ Repeat Processing ■ Grade Translation ■ Finalization of Grade 	No. Contains complex logic and should not be modified.	Yes
Approver Notification	Sends informative notifications to the selected Approver informing them that his unit section's grades have been submitted	Yes. Institutions may choose to modify the text of the message.	No
Repeat Error Notification	Sends informative notifications to the Requestor of the workflow informing them that an error has occurred while executing the Repeat Process activity	Yes. Institutions may choose to modify the text of the message.	No
Notify Error	Sends informative notifications to the Requestor of the workflow informing them that an error has occurred while trying to select an Approver	Yes. Institutions may choose to modify the text of the message.	Yes
End	Activity marks the logical successful end of the workflow	No	Yes
Error End	Activity marks the logical unsuccessful end of the workflow	No	Yes

C.7.1.3 Attendance Submission Workflow

Attendance Submission Notification notifies lead instructor of unit section that attendance for unit section is submitted.

The following table describes the Attendance Submission workflow activities.

Table C-18 Attendance Submission Workflow Activities

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. Attendance submission workflow is launched by oracle.apps.igs.as.infadmattdd business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes
Select Approver	Select the lead instructor of the unit section.	Yes. Institutions are encouraged to modify the activity to suit their respective hierarchy of approval.	Yes
Notify Approver	Sends informative notifications to the selected Approver informing them that his/her unit section's attendance has been submitted	Yes. Institutions may choose to modify the text of the message.	No
End	Activity marks the logical successful end of the workflow	No	Yes
Error: No Approver	Sends informative notifications to the Requestor of the workflow informing them that an error has occurred while trying to select an Approver	Yes. Institutions may choose to modify the text of the message.	No
Error End	Activity marks the logical unsuccessful end of the workflow	No	Yes

C.7.1.4 OSS: Notify Admin About Transcript Production

The OSS: Notify Admin About Transcript production workflow notifies the Administrator about the production of the transcript.

The following table describes the OSS: Notify Admin About Transcript Production workflow activities.

Table C–19 OSS: Notify Admin About Transcript Production Workflow Activities

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. This workflow is launched directly.	Yes. Institutions can add business events from where this workflow can be launched.	Yes
Notify the Order Requestor (Admin)	Sends notification to the job requestor (Administrator) about transcript production	Yes. Institutions may choose to modify the text of the message.	No
Business Event to notify individual Student	This raises a business event oracle.apps.igs.as.be_as004 to notify individual students about transcript production	Yes. Institutions can add other business events.	No
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.5 OSS: Notify Student About Transcript Production

The OSS: Notify Student About Transcript production workflow notifies the individual students who placed order about the production of the transcript.

The following table describes the OSS: Notify Student About Transcript Production workflow activities.

Table C–20 OSS: Notify Student About Transcript Production Workflow

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. This workflow is launched by oracle.apps.igs.as.be_as004 business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes

Table C–20 (Cont.) OSS: Notify Student About Transcript Production Workflow

Activity Name	Activity Description	Customizable	Required
Add Student to Role	Creates a role and adds the individual students, for whom the transcripts are produced, to the role	No. This role contains all the students to whom the notifications should be sent.	No
Notify Student about Transcript production	Sends notification to the individual students who placed the order about transcript production	Yes. Institutions may choose to modify the text of the message.	No
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.6 OSS: Notify About Missing Academic Record

The OSS: Notify About missing Academic Record workflow notifies the administrator about the missing academic records when a transcript request is placed by a student or by an administrator.

The following table describes the OSS: Notify About Missing Academic Record workflow activities.

Table C–21 OSS: Notify About Missing Academic Record Workflow

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. This workflow is launched directly	Yes. Institutions can add other business events from where this workflow can be launched.	Yes
Notify about missing Academic Record	Notifies the administrator about the missing academic records when a transcript request is placed by a student or an administrator	Yes. Institutions may choose to modify the text of the message.	No
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.7 OSS: Missing Academic Record Transcript Production

OSS: Missing Academic Record Transcript Production workflow notifies the student when an administrator manually updates the details of completion date of a missing academic records transcript.

The following table describes the OSS: Missing Academic Record Transcript Production workflow activities.

Table C-22 OSS: Missing Academic Record Transcript Production Workflow

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. This workflow is launched by oracle.apps.igs.as.orddoc.notstu business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes
Notify Missing Academic Record Transcript production	Notifies the student when an administrator manually updates the details of completion date of the student's missing academic records transcript.	Yes. Institutions may choose to modify the text of the message.	No
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.8 OSS: Notify Students About Transcript Hold

The OSS: Notify Students about Transcript hold workflow notifies the student about transcript hold when transcript is requested by an administrator for a student who has transcript hold.

The following table describes the OSS: Notify Students About Transcript Hold workflow activities.

Table C-23 OSS: Notify Students About Transcript Hold

Activity Name	Activity Description	Customizable	Required
Start Event	Determines which business event can launch the workflow. This workflow is launched by oracle.apps.igs.as.TranscriptReq.notify_hold business event.	Yes. Institutions can add other business events from where this workflow can be launched.	Yes

Table C–23 (Cont.) OSS: Notify Students About Transcript Hold

Activity Name	Activity Description	Customizable	Required
Create Adhoc Role	Creates a role and adds the individual student to the role	No. This role contains the student to whom the notification should be sent.	No
Student Notification	Notifies the student about transcript hold when a transcript is requested by an administrator for the student who has a transcript hold	Yes. Institutions may choose to modify the text of the message.	No
End	Activity marks the logical end of the workflow	No	Yes

C.7.1.9 IGS Degree Audit Workflow

The Submit Request raise event is invoked with the Batch ID of the UI generated request. After the process is called, the Submit Request receive event starts the workflow process passing the Batch ID of the request to be collected and validated.

The first validation is that the UI process has assembled all the required data needed to process the Degree Audit Request. It then collects all the required parameters called for in the workflow process. After the required data has been gathered, the trading partner XML document is generated, parsed, and transformed to from a DOCTYPE document to a Schema Namespace document. The document is queued for sending to the trading partner by Workflow Send Event event/function.

This process delivers the XML document to the trading partner taking advantage of Oracle XML Gateway Callback functionality. The Callback feature allows the messaging system (Oracle Transport Agent) to report message delivery status back to the workflow process that initiated the message creation. If the delivery fails, a Workflow notification is sent to the System Administrator defined in Oracle XML Gateway.

After the trading partner has processed the request and sends a reply, the Receive XML Document event is raised. The workflow then processes the reply document depending on the request type, storing any necessary data and notifying the requestor that the process is complete.

See Chapter 5, "Other Oracle Applications and Tools" for information about setting up Oracle XML Gateway.

The following table describes the IGS Degree Audit workflow activities.

Table C–24 IGS Degree Audit Workflow Activities

Activity Name	Activity Description	Customizable	Required
Submit DA Batch Event	<p>Begins the outbound Degree Audit interface.</p> <p>The Degree Audit workflow is launched through a subscription to the oracle.apps.igs.da.xml.reqsubm business event which is raised when a user presses the Submit button on the Review and Submit Request Self Service page. This event must be called from a Degree Audit Request to provide the proper student context for the XML views.</p>	Yes - can add parameters such as ECX_DEBUG.	Y
Generate Trading Partner XML Document	Generates the XML document to be sent to the trading partner.	Yes	Y
Workflow Send	Sends the XML document to the trading partner using the XML message callback method.	Yes	Y
End	None	No	No
Degree Audit XML Receive Event	<p>Begins the inbound Degree Audit interface.</p> <p>The Degree Audit workflow is launched through a subscription to the oracle.apps.igs.da.xml.receive business event which is raised after the trading partner sends a reply document.</p>	Yes	Y
Update Request Status	Updates the request status to Completed	Yes	Y
Notify Requestor	Sends a notification to the requestor regarding the completion of the request.	Yes	Y
End	None	No	No
Degree Audit XML Receive Error	<p>Begins the error process if an error is encountered in the receive process.</p> <p>The Degree Audit workflow is launched through a subscription to the oracle.apps.igs.da.xml.rcverr business event.</p>	Yes	Y

Table C–24 (Cont.) IGS Degree Audit Workflow Activities

Activity Name	Activity Description	Customizable	Required
Notify Requestor	Sends a notification to the requestor regarding the completion of the request.	Yes	Y
End	None	None	None

Transcript Change Validation Workflow

When a new transcript is created in Admission, the advanced standing records are validated to check if the existing advanced standing still applies for the student. If not, then the advanced standing records are deleted or updated and a notification is sent to the staff member.

C.7.2 Business Events

The following table describes the business events in Academic Records.

Table C–25 Business Events for Academic Records

Business Event	Item Type	Description
oracle.apps.igs.as.infadmincgrdsub	Incomplete Grade Submission	Triggered from the Enter Incomplete Grade self service screen; can be used by institutions to create a user-defined process to notify instructor about submitting an incomplete grade for student
oracle.apps.igs.as.infadmincgrd	Incomplete Grade Default	Triggered from the Assign Incomplete Grade concurrent process; can be used by institutions to create a user-defined process to notify instructor about the finalization of the default incomplete grade to a certain student
oracle.apps.igs.as.attend.notify_advanced	Attendance Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about attendance submission dates
oracle.apps.igs.as.attend.notify_start	Attendance Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that attendance submission period has started
oracle.apps.igs.as.attend.notify_end	Attendance End	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that attendance submission period has ended
oracle.apps.igs.final.notify_advanced	Final Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about final grading

Table C–25 (Cont.) Business Events for Academic Records

Business Event	Item Type	Description
oracle.apps.igs.as.f inal.notify_start	Final Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the final grading period grade submission period has started
oracle.apps.igs.as.f inal.notify_end	Final End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the final grading period grade submission period has ended
oracle.apps.igs.as.e arlyfinal.notify_ advanced	Early Final Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her early final grading period grade submission dates
oracle.apps.igs.as.e arlyfinal.notify_ start	Early Final Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the early final grading period grade submission period has started
oracle.apps.igs.as.e arlyfinal.notify_ end	Early Final End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that the early final grading period grade submission period has ended
oracle.apps.igs.as. midterm.notify_ advanced	Mid Term Advance Notice	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to send advance notification to an instructor informing him or her about mid term grading period grade submission dates
oracle.apps.igs.as. midterm.notify_ start	Mid Term Start	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that mid term grading period grade submission period has started
oracle.apps.igs.as. midterm.notify_ end	Mid Term End Date	Triggered from the Generate Assessments Notifications concurrent process; can be used by institutions to create a user-defined process to notify an instructor that mid term grading period grade submission period has ended
oracle.apps.igs.as.i nfadmgrmt	Grade Mid Term	Triggered from the Review Grade self service screen for mid term grading period; can be used by institutions to create a user-defined process to see resolution of grade submission for mid term grading period from lead instructor of unit section

Table C-25 (Cont.) Business Events for Academic Records

Business Event	Item Type	Description
oracle.apps.igs.pr.c lsrank.be_cr003	Ranking Process Complete Event	Triggered from completion of the Run Ranking Process concurrent process. The event contains the following details: <ul style="list-style-type: none"> ■ cohort name ■ cohort instance ■ run date ■ cohort total
oracle.apps.igs.pr.c lsrank.be_cr001	Cohort Status Change Event	Triggered by class rank status change. The event contains the following details: <ul style="list-style-type: none"> ■ cohort name ■ cohort instance ■ new cohort status ■ new rank status
oracle.apps.igs.pr.c lsrank.be_cr002	Rank Override Event	Triggered by overriding class rank. The event contains the following details: <ul style="list-style-type: none"> ■ student ID ■ student name ■ current rank ■ override rank ■ override comment ■ person ID / name of person who entered override details
oracle.apps.igs.pr.a pprove_otcm	Approve Outcome	Triggered when a positive outcome is approved
oracle.apps.igs.pr.a pply_otcm	Apply Negative Outcome	Triggered when a negative outcome is applied against a student
oracle.apps.igs.pr.a pply_positive_ otcm	Apply Positive Outcome	Triggered when a positive outcome is applied against a student
oracle.apps.igs.pr.s howcause_uph_ dsm	Show Cause Upheld / Dismissed	Triggered when the show cause decision is upheld or denied
oracle.apps.igs.pr.a ppeal_uph_dsm	Appeal Upheld / Dismissed	Triggered when the appeal decision is upheld or denied

Table C–25 (Cont.) Business Events for Academic Records

Business Event	Item Type	Description
oracle.apps.igs.pr.remove_waive_cancel_otcm	Outcome Removed / Waived / Cancelled	Triggered when an outcome is removed, waived, or cancelled
oracle.apps.igs.as.igrdrel	Inform Instructor about Assessment Item Grades Release to Student	Triggered when assessment item grades released to student
oracle.apps.igs.as.usgrdsub	Inform Instructor That Unit Section Grades Have Been Submitted	Triggered when unit section grades are submitted for midterm and final
oracle.apps.igs.av.validate_transcript	Saved Transcript	Triggered when a transcript is saved

The following table shows workflow and business event parameters for Records.

Table C–26 Records Parameters

Workflow / Business Event	Parameter
oracle.apps.igs.as.infadmchg	PERSON_ID
Change Grade Submission, Final	PERSON_NAME
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	PERSON_NUMBER
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	COURSE_CD
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	UNIT_CODE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	UNIT_SECTION
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	UNIT_TITLE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	GRADING_SCHEMA
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CURRENT_MARK

Table C-26 (Cont.) Records Parameters

Workflow / Business Event	Parameter
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CURRENT_GRADE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CHANGE_MARK
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CHANGE_GRADE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	REQUESTER_ID
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	REQUESTER_NAME
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	REQUESTER_NUMBER
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	REQUEST_DATE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	REQUESTER_COMMENTS
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	TEACH_CAL_TYPE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	TEACH_CI_SEQUENCE_NUMBER
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	LOAD_CAL_TYPE
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CI_SEQUENCE_NUMBER
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CI_START_DT
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CI_END_DT
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	UOO_ID
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	CHANGE_GRADE_VERSION_NUM

Table C-26 (Cont.) Records Parameters

Workflow / Business Event	Parameter
BusinessEvent -> Workflow Approval Notification (Repeat/Translate/Finalize process)	GRADING_PERIOD_CD
oracle.apps.igs.as.infadmatttd	UOO_ID
Attendance Submission	UNIT_CD
BusinessEvent -> Workflow Notification	UNIT_SECTION
BusinessEvent -> Workflow Notification	UNIT_TITLE
BusinessEvent -> Workflow Notification	INSTRUCTOR
BusinessEvent -> Workflow Notification	SUBMISSION_DATE
oracle.apps.igs.as.infadmgrdmt	UOO_ID
MidTerm Grade Submission	UNIT_CD
Submission BusinessEvent	UNIT_SECTION
Submission BusinessEvent	UNIT_TITLE
Submission BusinessEvent	INSTRUCTOR
Submission BusinessEvent	SUBMISSION_DATE
oracle.apps.igs.as.infadmgrd	UOO_ID
Final Grade Submission	UNIT_CD
BusinessEvent -> Workflow Notification (Repeat/Translate/Finalize process)	UNIT_SECTION
BusinessEvent -> Workflow Notification (Repeat/Translate/Finalize process)	UNIT_TITLE
BusinessEvent -> Workflow Notification (Repeat/Translate/Finalize process)	INSTRUCTOR
BusinessEvent -> Workflow Notification (Repeat/Translate/Finalize process)	SUBMISSION_DATE
BusinessEvent -> Workflow Notification (Repeat/Translate/Finalize process)	FROM_USER_ID
oracle.apps.igs.as.infadmindgrdsub	PERSON_ID
Incomplete Grade Submission	COURSE_CD
BusinessEvent (intended for Student notification)	UNIT_CD
BusinessEvent (intended for Student notification)	CAL_TYPE

Table C–26 (Cont.) Records Parameters

Workflow / Business Event	Parameter
BusinessEvent (intended for Student notification)	CI_SEQUENCE_NUMBER
BusinessEvent (intended for Student notification)	GRADE
BusinessEvent (intended for Student notification)	INCOMP_DEADLINE_DATE
BusinessEvent (intended for Student notification)	INCOMP_DEFAULT_GRADE
BusinessEvent (intended for Student notification)	INCOMP_DEFAULT_MARK
BusinessEvent (intended for Student notification)	DATE_SUBMITTED
oracle.apps.igs.as.infadmindmgrd	PERSON_ID
Incomplete Grade Default	COURSE_CD
BusinessEvent (intended for Student notification)	UNIT_CD
BusinessEvent (intended for Student notification)	CAL_TYPE
BusinessEvent (intended for Student notification)	CI_SEQUENCE_NUMBER
BusinessEvent (intended for Student notification)	DATE_CHANGED
BusinessEvent (intended for Student notification)	OLD_GRADE
BusinessEvent (intended for Student notification)	NEW_GRADE
oracle.apps.igs.as.attend.notify_advanced	UOO_ID
Attendance Advance Notice	TEACH_DESCRIPTION
BusinessEvent (intended for Lead Instructor notification)	LOAD_DESCRIPTION
BusinessEvent (intended for Lead Instructor notification)	GRADING_PERIOD_START_DT
BusinessEvent (intended for Lead Instructor notification)	GRADING_PERIOD_END_DT
BusinessEvent (intended for Lead Instructor notification)	UNIT_CD
BusinessEvent (intended for Lead Instructor notification)	UNIT_CLASS
BusinessEvent (intended for Lead Instructor notification)	LOCATION_CD

Table C–26 (Cont.) Records Parameters

Workflow / Business Event	Parameter
BusinessEvent (intended for Lead Instructor notification)	LOCATION_ DESCRIPTION
BusinessEvent (intended for Lead Instructor notification)	TITLE
BusinessEvent (intended for Lead Instructor notification)	SHORT_TITLE
BusinessEvent (intended for Lead Instructor notification)	INSTRUCTOR_ID
oracle.apps.igs.as.be_as004	EA_DOC_TYPE
Notify Student about Transcript production	EA_DATE_ PRODUCED
oracle.apps.igs.as.orddoc.notstu	IA_PERSON_ID
Notify Student about Missing Academic Record Transcript Production	IA_ORDER_ NUMBER
Notify Student about Missing Academic Record Transcript Production	IA_DOCUMENT_ NUMBER
Notify Student about Missing Academic Record Transcript Production	IA_DOCUMENT_ TYPE
Notify Student about Missing Academic Record Transcript Production	IA_RECIPIENT_ NAME
Notify Student about Missing Academic Record Transcript Production	IA_RECEIVING_ INST_NAME
Notify Student about Missing Academic Record Transcript Production	IA_DELIVERY_ METHOD
Notify Student about Missing Academic Record Transcript Production	IA_FULFILLMENT_ DATE_TIME
Notify Student about Missing Academic Record Transcript Production	IA_ADHOCROLE
oracle.apps.igs.as.TranscriptReq.notify_hold	IA_NAME
Notify Students about Transcript hold	IA_USERS
Notify Students about Transcript hold	IA_SUBJECT
Notify Students about Transcript hold	IA_MESSAGE

C.8 Advising

Use these workflows to support the processing of advising tasks.

C.8.1 Workflows

The following describes workflows in Advising.

Table C-27 Workflows for Advising

Workflow	Business Event	Item Type	Description
NA	oracle.apps.igs.az.ntfy advr	Notify Advisor About Advising Group	Triggered when an advisor gets assigned to or removed from an advising group; notifies each advisor when he or she gets assigned to or removed from an advising group
NA	oracle.apps.igs.az.ntfy hold	Notify Student About Advising Group	Triggered when a student gets assigned to or removed from an advising group; notifies each student when he or she gets assigned to or removed from an advising group
NA	oracle.apps.igs.az.ntfy stud	Notify Student About Being Put on an Advising Hold	Triggered when a student has been put on an advising hold for a particular advising group; notifies each student when he or she has been put on an advising hold for an advising group

C.8.1.1 Notify Advisor About Advising Group

The Notify Advisor About Advising Group workflow notifies each advisor when he or she gets assigned to or removed from an advising group.

C.8.1.2 Notify Student About Advising Group

The Notify Student About Advising Group workflow notifies each student when he or she gets assigned to or removed from an advising group.

C.8.1.3 Notify Student About Being Placed on an Advising Hold

The Notify Student About Being Placed on an Advising Hold workflow notifies each student when he or she has been put on an advising hold for an advising group.

The following table describes Advising parameters.

Table C–28 Advising Parameters

Workflow / Business Event	Parameter
Notify Students about Advising Group	GROUP_STUDENT_ID
Notify Students about Advising Group	SYSDATE
Notify Students about Advising Group	START_DT
Notify Students about Advising Group	END_DT
Notify Advisors about Advising Group	GROUP_ADVISOR_ID
Notify Advisors about Advising Group	SYSDATE
Notify Advisors about Advising Group	START_DT
Notify Advisors about Advising Group	END_DT
Notify Student About Being Put on an Advising Hold	GROUP_STUDENT_ID
Notify Student About Being Put on an Advising Hold	ADVISING_HOLD_TYPE
Notify Student About Being Put on an Advising Hold	HOLD_START_DT
Notify Student About Being Put on an Advising Hold	EXPIRY_DT

Oracle Student System Lookups

D.1 Lookups in Oracle Student System

The Oracle Student System Lookups window and the Student Systems Fin Aid Lookups window allow you create or update lookups for each lookup type and lookup codes for each lookup type.

A lookup is a valid list of values for certain types of information. A lookup code is the allowable value for a lookup type.

A lookup type is a category of information, such as nationality, address type, and tax type. Each lookup type has a limited list of valid values. A lookup type is also referred to as a list of values.

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- Ensures all users use the same terminology, which makes it easier to inquire and report on the information
- Speeds up data entry because users can enter just enough to identify the value, and Oracle Student System completes the entry

You can define your own lookups, lookup types, and lookup codes as well as add values to some predefined lookup types. Lookup types can only be updated if its access level is either **User** or **Extensible**.

Although you can make lookup types inactive, you cannot delete a record from a lookup type, regardless of its access level.

To remove an obsolete lookup, disable the lookup code, enter an end date, or change the meaning and description to match a replacement code.

Note: You must not delete the lookup codes for the following Extensible lookups:

- IGS_CC_EXP_YEAR
- IGS_CREDIT_CARDS
- FEE_CLASS
- IGS_FL_REVERSAL_REASON
- IGS_FL_WAIVER_REASON
- IGS_FL_CREDIT_INSTRUMENT

For information about creating lookup types, see *Oracle Applications System Administrator's Guide*.

Adding Lookup Codes to User and Extensible Lookup Types

1. In Oracle Student System, navigate to the Oracle Student System Lookups window as follows:

Setups > Lookups

The Oracle Student System Lookups window appears.

2. Navigate to the Lookup Types window as follows:

View > Find

3. In the Type field, enter % and a search term, followed by %.
4. Select the lookup type that you want and click **OK**.
5. Add codes to the lookup type.
6. Save your work.

Note: You must define ethnicity codes can be mapped to the UCAS and HESA standard ethnicity codes. Add codes to the **IGS_ETHNIC_ORIGIN** lookup.

D.2 Oracle Student System Extensible Lookups

The following describes Oracle Student System extensible lookups with seeded values.

Table D–1 Oracle Student System Extensible Lookups

Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
FEE_CLASS	Fee Class	BOOKS	Books

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
FEE_CLASS	Fee Class	COURSE	Program Fees
FEE_CLASS	Fee Class	HOUSING	Housing
FEE_CLASS	Fee Class	INSTITUTION	Institutional Fees
FEE_CLASS	Fee Class	STUDENT	Student Fees
FEE_CLASS	Fee Class	TUITION	Tuition
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	CONTINUING_EDUCATION	Continuing Education
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	ENCERT	Enrollment Certificate
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	LIFE_TIME_TRANS	Lifetime Transcript Service
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	OFFICIAL	Official Transcript
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	OTHERS	Others
IGS_AS_DOCUMENT_SUB_TYPE	Document Sub Type	UNOFFICIAL	Unofficial Transcript
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2001	2001
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2002	2002
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2003	2003
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2004	2004
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2005	2005
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2006	2006
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2007	2007

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2008	2008
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2009	2009
IGS_CC_EXP_YEAR	Credit Card Expiration Years	2010	2010
IGS_DA_LINE_TYPE	Degree Audit Line Type Indicator	BLNK	Line types not included
IGS_DA_LINE_TYPE	Degree Audit Line Type Indicator	L	Line types included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	BLNK	Include All Requirements
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	N	Include only incomplete requirements
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	OSRI	Only Satisfied Requirements Included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	OURI	Only Unsatisfied Requirements Included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	SPEC	Special Software Defined
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	STND	Standard All Requirements Included
IGS_DA_PRNT_RQMNTS	Degree Audit Print Requirements	Y	Include only complete requirements
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	BLNK	Normal Audit
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	C	Incomplete with no in-progress requirements

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	F	Include only incomplete requirements
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	N	No reports
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	NINC	Reports With No Incomplete Requirements (Ip Ok)
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	NINP	Reports W/ No Incomplete Requirements (Ip Not Ok)
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	P	Include only complete requirements
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SDEG	Special Defined Degree Audit
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SEVL	Special Software Defined Transfer Evaluation
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	SINC	Reports With Some Incomplete Requirements Produced
IGS_DA_PROD_RPTS	Degree Audit Produce Reports	STND	Standard All Reports Produced
IGS_DA_REF_ARTICS	Degree Audit Reference Articulation	EXCL	Do Not Include Reference Articulation
IGS_DA_REF_ARTICS	Degree Audit Reference Articulation	INCL	Include Reference Articulation
IGS_DA_RPT_FORMAT	Degree Audit Report Format	STND	Standard

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	BLNK	Normal Audit
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	COLR	Color Report
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	EXTD	Extended Report
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	L	Full Listing
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	M	Include Pseudo Courses
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	P	Post Card
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	S	Short Listing
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SHRT	Short Report - No List of Select or Reject Units
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SPTC	Standard Report Special Technical
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	SPTR	Standard Report Special Transfer Evaluation
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	STND	Standard Report
IGS_DA_RPT_SIZES	Degree Audit Report Size /List all	VSHT	V. Short Report Requirement Titles and Status Only
IGS_ETHNIC_ORIGIN	Ethnic Origin for Student System	HISPANIC_LATINO	Hispanic or Latino
IGS_ETHNIC_ORIGIN	Ethnic Origin for Student System	NON HISPANIC	Non Hispanic or Latino
IGS_ETHNIC_ORIGIN	Ethnic Origin for Student System	OTHER	Others

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	ADJ	Negative Charge Adjustment type
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	AID	Aid
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CASH	Cash
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CC	Credit Card
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	CHECK	Check
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	DEPOSIT	Deposit
IGS_FI_CREDIT_INSTRUMENT	Credit Instrument	LOCKBOX	Lockbox
IGS_FI_REVERSAL_REASON	Reversal Reason	NSF	Not Sufficient Fund
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	ACCO	Accommodation Deposit
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	ADM	Admission Application
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	DEPOSIT	Deposit
IGS_FI_SOURCE_TRANSACTION_REF	Source Transaction Type - Deposits	LIB	Library Deposit
IGS_FI_WAIVER_REASON	Waiver Reason	MANUAL_REFUND	Manual reversal of refund voucher
IGS_FI_WAIVER_REASON	Waiver Reason	TUITION_WAIVER	Manual application of tuition waiver
IGS_PS_USEC_CHARGE	Unit Section Charges	DEFAULT	Miscellaneous Additional Charges
INTERVIEW_ROLE_TYPE	Interview Role Types	APPROVER	APPROVER

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
INTERVIEW_ROLE_TYPE	Interview Role Types	INTERVIEWER	INTERVIEWER
INTERVIEW_ROLE_TYPE	Interview Role Types	INTERVIEWER + APPROVER	INTERVIEWER + APPROVER
INTERVIEW_ROLE_TYPE	Interview Role Types	READER	READER
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	MANUAL	Manually changed
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	SELSERVICE	Uploaded from Self Service Screen
MARKS_GRADE_CHANGE_COMMENT	Marks / Grade change comment	UPLOAD	Uploaded from Oracle Web Applications Desktop Integrator spreadsheet
OR_ACCR_STATUS	OR_ACCR_STATUS	ACCRED	Accredited Status
OR_ACCR_STATUS	OR_ACCR_STATUS	ACTIVE	Active Status
OR_ACCR_STATUS	OR_ACCR_STATUS	INACTIVE	Inactive Status
OR_ACCR_STATUS	OR_ACCR_STATUS	NON-ACCRED	Non-Accredited Status
OR_ACCR_STATUS	OR_ACCR_STATUS	PENDING	Pending
OR_ACCR_STATUS	OR_ACCR_STATUS	PROBATION	Probation Status
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	FEDERAL	Federal Agency
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	HOME	Home School
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	NON-PROFIT	Non-Profit Agency
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PAROCHIAL	Parochial
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PRIVATE	Private Institution
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PROFIT	For Profit
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	PUBLIC	Public Institution
OR_INST_CTL_TYPE	OR_INST_CTL_TYPE	TRIBAL	Tribal

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	HIGH	High Priority
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	LOW	Low Priority
OR_INST_PRIORITY_CD	OR_INST_PRIORITY_CD	MEDIUM	Medium Priority
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	EPS_FIRST_GEN	EPS First Generation Test Takers
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	GRAD_PERCENT	Percent of Students Graduating
OR_INST_STAT_TYPE	OR_INST_STAT_TYPE	TEST_TAKE_PERCENT	Percent of Students Taking Test
OR_MEMBER_TYPE	OR_MEMBER_TYPE	CENTER	Center
OR_MEMBER_TYPE	OR_MEMBER_TYPE	COLLEGE	College
OR_MEMBER_TYPE	OR_MEMBER_TYPE	DEPART	Department
OR_MEMBER_TYPE	OR_MEMBER_TYPE	DIVISION	Division
OR_MEMBER_TYPE	OR_MEMBER_TYPE	EXTERNAL	External Organization
OR_MEMBER_TYPE	OR_MEMBER_TYPE	FACULTY	Faculty Organization
OR_MEMBER_TYPE	OR_MEMBER_TYPE	INTERNAL	Internal Organization
OR_MEMBER_TYPE	OR_MEMBER_TYPE	SCHOOL	School
OR_ORG_TYPE	OR_ORG_TYPE	ACAD	Academic Organization
OR_ORG_TYPE	OR_ORG_TYPE	ADMIN	Administrative Organization
OR_ORG_TYPE	OR_ORG_TYPE	AGENT	Agent
OR_ORG_TYPE	OR_ORG_TYPE	EXTERNAL	External
OR_ORG_TYPE	OR_ORG_TYPE	INTERNAL	Internal

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
OR_ORG_TYPE	OR_ORG_TYPE	SUPPORT	Support
PAYMENT_MODE	Payment Mode	CHECK	Check
PAYMENT_MODE	Payment Mode	EFT	Electronic Fund Transfer
PERSON_ID_TYPE	Person Id Type	DRIVER_LIC	Driver's License Number
PERSON_ID_TYPE	Person Id Type	MERGE-INTO	Obsolete Person's Details Merged Into Person Id
PERSON_ID_TYPE	Person Id Type	OBSOLETE	Person's Details Merged From Obsolete Person Id
PERSON_ID_TYPE	Person Id Type	OLAA	Old Student Id
PERSON_ID_TYPE	Person Id Type	OTHER	Other
PERSON_ID_TYPE	Person Id Type	PAY_ADV_NO	Payment Advice Number
PERSON_ID_TYPE	Person Id Type	SEVIS_ID	SEVIS User ID
PERSON_ID_TYPE	Person Id Type	SLC	Student Loan Company ID (UK only)
PERSON_ID_TYPE	Person Id Type	SSN	Social Security Number
PERSON_ID_TYPE	Person Id Type	STAFF	Staff Member Id
PERSON_ID_TYPE	Person Id Type	TAC	Academic History Admission Center Student Id
PERSON_ID_TYPE	Person Id Type	TAXID	Taxpayer ID
PERSON_PRIVACY_RELEASE	Person Privacy Release	ALL	All
PE_NOTE_TYPE	Person Note Types	ACADEMIC	Academic
PE_NOTE_TYPE	Person Note Types	BELOW_FULL_LOAD	Drop Below Full Load

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
PE_NOTE_TYPE	Person Note Types	DISCIPLINE	Disciplinary
PE_NOTE_TYPE	Person Note Types	FINANCIAL	Financial
PE_NOTE_TYPE	Person Note Types	RET_FULL_LOAD	Return to Full Load
PE_NOTE_TYPE	Person Note Types	TRANSCRIPT	Transcript
PE_RACE	Person Races	AMERICAN_INDIAN	American Indian or Alaska Native
PE_RACE	Person Races	ASIAN	Asian
PE_RACE	Person Races	BLACK_AFRICAN	Black or African American
PE_RACE	Person Races	HAWAIIAN_ISLANDER	Native Hawaiian or Other Pacific Islander
PE_RACE	Person Races	WHITE	White
PR_EXTERNAL_STAT_SOURCE	External Statistics Source	DEGREE AUDIT	Degree Audit
PR_EXTERNAL_STAT_SOURCE	External Statistics Source	INTERNAL	Internal
PR_EXTERNAL_STAT_SOURCE	External Statistics Source	OTHER	Other
REFERENCE_CD_TYPE	Reference Code Type	CRICOS	Commonwealth Reg. Of Inst. & Programs For Overseas Students
REFERENCE_CD_TYPE	Reference Code Type	CRSOFSTUDY	Program Of Study
REFERENCE_CD_TYPE	Reference Code Type	IVR	Interactive Voice Response
REFERENCE_CD_TYPE	Reference Code Type	OTHER	Other
REFERENCE_CD_TYPE	Reference Code Type	STATS	Statistics
REFERENCE_CD_TYPE	Reference Code Type	TAC-FEE	TAC Fee Paying Program

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
REFERENCE_CD_TYPE	Reference Code Type	TAC-HECS	TAC HECS Paying Program
SCREEN_ROLE_TYPE	Screening Role Types	SHORTLISTER	Shortlister for Interview
SCREEN_ROLE_TYPE	Screening Role Types	SHORTLISTER + TUTOR	Shortlister + Tutor
SCREEN_ROLE_TYPE	Screening Role Types	TUTOR	TUTOR
VETERAN_STATUS	VETERAN_STATUS	VETERAN	Veteran
VETERAN_STATUS	VETERAN_STATUS	VETERAN_DEP	Dependant of a Veteran
VETERAN_STATUS	VETERAN_STATUS	VETERAN_NOT	Not a Veteran
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	BOOKS	Books
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	COMPUTER	Computer
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	DEPENDENT_CARE	Dependent Care
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	DISABILITY	Disability
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	FEES	Fees
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	JOB_REL_EXP	Job Related Expenses
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	LAB_FEES	Lab Fees
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	LOAN_FEES	Loan Fees
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	MISC	Miscellaneous
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	ROOM_BOARD	Room & Board
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	STUDY_ABROAD_COSTS	Study Abroad Costs

Table D–1 Oracle Student System Extensible Lookups

(Cont.) Lookup Type	Lookup Meaning	Lookup Code	Lookup Code Meaning
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	SUPPLIES	Supplies
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	TRANSPORTATION	Transportation
IGF_AW_COA_ITEM_CATEGORY	COA Item Category	TUITION	Tuition

CAUTION: Do not change the values for the user-defined lookup IGS_AD_ADM_APPL_RANGE.

Implementation Concurrent Processes

E.1 Implementation Concurrent Processes

This appendix deals with the concurrent processes provided by Oracle Student System. These concurrent processes help automate tasks that are performed on a regular basis during your academic year. For example, you can run a concurrent process to pre-enroll a group of students or to transfer student deposits as credit to students' accounts.

This appendix has the following sections:

- Features and Components of a Concurrent Process
- Using Concurrent Processes

E.2 Features and Components of a Concurrent Process

Most concurrent processes have an associated Parameters window. Some parameters define the intent and extent of the job while others define the target affected by the job. The target of a concurrent process can be a set of students, applications, or accounts.

You can set a concurrent process to notify a person or print an output each time the concurrent process is run, by specifying settings.

A concurrent process can be run either in the immediate mode or as a scheduled job. You can set up a concurrent process to run to the following schedules:

- Periodic intervals applied to the following:
 - The start of the previous run
 - The end of the previous run

- A specific period
- Indefinitely
- Specific days of the week or month
- Once on a particular day and time

A concurrent process may be run on its own as a single request or be part of a request set. If it is part of a request set, the concurrent process will run in the sequence defined by the set.

When you run a concurrent process, you can use the View - Requests menu option to check the stage that it is currently in. These stages are as follows:

- In queue and Still pending
- Running
- Completed

The Requests window also displays the status of the request as follows:

- Error
- Normal

For every request submitted, Oracle Student System maintains the following:

- Log - displays the start and end date and time, the progress, the errors, whether there was an output, the number of copies printed, and the request ID.

All concurrent processes irrespective of whether or not they produce an output or report, produce a log file. You can check the errors, correct these, and run the process again.

- Output - displays a summary of the statistics of records processed.
- Details - displays all the details that appear on the Submit Request window with additional details such as phase, status, requestor, scheduled start date, priority, and dates of submission, start, and completion.

Note: Not all concurrent processes produce an output or a report. However, even if there is no report you can still view the output.

E.3 Using Concurrent Processes

This section consists of the following:

Running a Concurrent Process in Immediate Mode

Scheduling a Concurrent Process

Running a Request Set

Finding and Reviewing a Submitted Request

E.3.1 Running a Concurrent Process in Immediate Mode

To run a concurrent process in immediate mode, perform the following steps:

1. In Oracle Student System, navigate to the Submit a New Request window as follows:

Requests > Concurrent Manager > Requests > Run

The Submit a New Request window appears.

2. Select the Single Request radio button.
3. Select **OK**.

The Submit Request window appears.

4. In the Name field, select the concurrent process from the drop-down list or do a partial search in the Find field using % as a wildcard.

The Parameters window appears.

Note: For concurrent processes that do not have parameters, please look at Step 7.

5. Enter data in appropriate fields.

For information on parameters, see the associated table for a concurrent process.

6. To apply the parameters, select **OK**.

The Parameters window closes, and the parameters specified appear in the Parameters field of the Submit Request window.

7. To run a concurrent process that you have run before, with the same parameters, select **Copy** in the Submit Request window. This selects the previous concurrent process request from the list of values and copies the name and parameters of the concurrent process.

Note: Previous requests are displayed by name with the respective parameters passed for the concurrent process.

8. To send the request to the concurrent manager, select **Submit**.

A message with the request ID of the submitted request appears.

9. Select **Yes** to submit another request or run another concurrent process. Select **No** to close the Submit Request window.

E.3.2 Scheduling a Concurrent Process

To set up a schedule for a concurrent process, perform the following steps:

1. In Oracle Student System, navigate to the Submit a New Request window, select the Single Request radio button, and select **OK**.
2. Select a concurrent process and enter parameters for it.
3. Optionally, select **Copy** to copy the concurrent process name and parameters from a previous request.
4. For more information on how to run a concurrent process in immediate mode, see Running a Concurrent Process in Immediate Mode.
5. To set up a schedule for the process, select **Schedule** and select the Periodically or the On Specific Days radio button.
 - a. For periodic runs, enter the interval at which the process is to be run, and whether the interval is to be applied to the start or the end of the previous run.
 - b. You can set the process to run on specific days of a month or a week.
 - c. You can also enter an end date to denote the period for which these settings will apply or leave this blank to apply the schedule indefinitely. You can save this schedule and use the **Apply a Saved Schedule** to apply this to a different concurrent process. You can choose to have the date parameters, if available, for a process to increment per the system date with each subsequent run.
6. Optionally, select **Apply a Saved Schedule** to apply an already saved schedule to the concurrent process.
7. To send the request to the concurrent manager, select **Submit**.

A message with the request ID of the submitted request appears. Select **Yes** to submit another request or run another concurrent process. Select **No** to close the Submit Request window.

E.3.3 Running a Request Set

To run a request set, perform the following steps:

1. In Oracle Student System, navigate to the Submit a New Request window.
2. Select the Request Set radio button, and select **OK**.
3. In the Request Set field, enter the name of the request set. Alternatively, select **Copy...** to use the previous request set submission.
4. To send the request to the concurrent manager, select **Submit**.

A message with the request ID of the submitted request appears. A message with the request ID of the submitted request appears. Select **Yes** to submit another request or run another concurrent process. Select **No** to close the Submit Request window.

E.3.4 Finding and Reviewing a Submitted Request

To find and review a submitted request, perform the following steps:

1. In Oracle Student System, navigate to the Find Requests window as follows:

Requests > Concurrent Manager > Requests > Concurrent

The Find Requests window appears.

2. Optionally, you can use the **View > Requests** menu option to open the Find Requests window.
3. Select an appropriate radio button to specify the level of requests you want to view:
 - Only completed requests
 - Requests in progress
 - All your requests
 - Specific requests
4. To find a specific request, select the Specific Requests radio button and enter the request ID, or the name, requestor, and date of submission.
5. Select **Find**.

The Requests window appears, displaying the request details. If the number of requests retrieved is more than one, for example for a specific date of submission, all the requests are listed.

6. To view additional details of a request, select the appropriate request ID and select **View Details**.

The Request Detail window appears.

7. To view the log file, select the appropriate request ID and select **View Log**.
8. If there are any errors, make corrections and run the concurrent process again.
9. If the concurrent process has an output, select **View Output** to view a summary of the statistics on the records processed.
10. Close the window.

For more information on concurrent processing, see *Oracle Applications User's Guide*.

E.3.5 Entering Concurrent Process Text IGSGE008

Enter concurrent process text.

Prerequisites

Oracle Student System must be set up.

Navigation

Requests > Job Text

Additional Notes and Business Rules

Insertion: Text to be inserted in a concurrent process must match the format and content of the report.

Multiple text records: Various text records can be created for a single concurrent process.

Parameters: Parameters in the same concurrent process can be used to insert different text records in the same report. The list of values for a text parameter displays all text records available to the concurrent process, regardless of whether they apply to the particular parameter.

E.4 Calendar Concurrent Processes

Run the calendar concurrent processes to confirm setup and to rollover calendar data.

Calendar Date Report Concurrent Process

This concurrent process lists important institution dates for a selected combination of parameters:

Runtime Comment: Comment that appears on header page of report

Date Alias Category: User-defined classification of date aliases according to common attributes for inquiry or reporting purposes

Calendar Type: User-defined name given to all calendars of similar classification

Calendar Status: User-defined status indicating calendar's level of activity

Range Start Date: Range start date; mandatory

Range End Date: Range end date; mandatory

Include Sub Calendar Type: Include sub calendar type

Rollover Calendar Report Concurrent Process

This concurrent process lists new calendar instances, their relationships, and the new date alias instance created from the Rollover Calendar Instance window. This concurrent process records exceptions for those values for which rollover could not be completed successfully.

Runtime Comment: Comment that appears on header page of report

Creation Date: Creation date of rollover process executed; mandatory

Sort By: Sort by

Sort Order: Sort order

Monthly Calendar Report Concurrent Process

This concurrent process produces a report that displays date alias instance details in a daily block in a traditional wall calendar format.

Runtime Comment: Comment that appears on header page of report

Month: Month; mandatory

Year: Year; mandatory

Format: Page format

Date Alias Instances Report Concurrent Process

This concurrent process creates a list of date alias instance details for any combination of:

- Calendar category
- Calendar status

- Calendar type
- Date alias
- Date alias category
- Date range combination
- Offset details
- Pair details

Run this concurrent process to view completed setup.

E.5 Organizational Structure Concurrent Processes

Run organization structure concurrent processes to view completed setup for your organizational structure.

Organizational Unit Details Report Concurrent Process

This concurrent process lists all organizational unit details except relationships for a selected combination of parameters.

Runtime Comment: Comment that appears on header page of report

Member Type: User-defined classification of organizational units by structure level

Organizational Type: Organizational unit classification

Organizational Status: Organizational unit activity

Organizational Unit Code: User-defined code for organizational unit

Sort1: 1st sort attribute

Sort Order1: Sort order1st by ascending or descending

Sort2: 2nd sort attribute

SortOrder2: Sort order 2nd by ascending or descending

Parent-Child Organizational Unit Report Concurrent Process

This concurrent process describes relationships between organizational units for selected organizational units. There is a maximum of fifteen levels.

Runtime Comment: Comment that appears on header page of report

Organizational Unit Code: User-defined code for organizational unit

Delete System Log Entries Concurrent Process

This concurrent process should be scheduled to run automatically at regular intervals as often as necessary. This concurrent process is typically run at night or during other off-peak times.

System Log Type: System log type to be deleted. System log type is abbreviated name for concurrent process that produced entry. A separate instance of this concurrent process must be requested to delete entries of each log type. This allows each system log type's entries to be deleted at different ages.

Days Old: Number of days old. System log entries are deleted if older than this number.

Import Institutions Crosswalk Concurrent Process

This concurrent process takes records with the status **Pending** from interface crosswalk and imports them into the Oracle Student System crosswalk. The crosswalk translates different institution identifiers coming from different sources to each other and to a common identifier. If any error occurs during import, then the corresponding record is marked as an **Error** and the concurrent process proceeds to the next record. You can correct the error and change the status of the record to **Pending** and run the process again.

All records are maintained in the interface until you remove them. A common identifier is generated automatically during the import of the data from the Crosswalk interface to the Oracle Student System Crosswalk.

There are no parameters for the Import Institutions Crosswalk concurrent process.

Import Institutions Crosswalk Error Report Concurrent Process

This concurrent process displays error records during the import from Interface Crosswalk to Oracle Student System Crosswalk. Run this concurrent process after running the Import Institutions Crosswalk concurrent process.

There are no parameters for the Import Institutions Crosswalk Error Report concurrent process.

Import Institution Concurrent Process

This concurrent process imports addresses, contacts, and notes about external institutions.

P_DATE: Date. The default is system date.

Batch Identifier: Unique batch ID

Data Source: Identifies all the records in the import batch as belonging to the same data set and creates the same alternate ID type.

Match Data Source: If a value is entered for this parameter, then the concurrent process checks if the alternate data source and the alternate data source ID are present in the Crosswalk table. If the record exists in the Oracle Student System table, the Import Institution concurrent process updates the record. If a record does not exist, then the concurrent process creates a new record.

Numeric Match: Y and N. Oracle Student System performs a numeric match between data source and match data source. If a value is entered for this parameter, then Oracle Student System maps the data source value and the alternate data source value in the Oracle Student System table.

Address Usage: Use of the institution address

Person Type: Contact person

Import Process Institution Error Report Concurrent Process

The Import Process Institution Error Report concurrent process displays error records during the import of institutions from Interface Institution table to Oracle Student System table.

Only error records during the import from interface to Student System must be displayed. The records with error status 3 are displayed. You can run the report after running the Import Institutions concurrent process.

Batch Description: Batch description

E.6 Person Concurrent Processes

Person concurrent processes creates FND users.

Person User Name Batch Creation

This concurrent process creates user accounts in bulk. Your institution can have thousands of applications imported into your system. Each of these applicants may need to have a user account to gain access to view their application from your institution's web site.

This concurrent process validates if the person has an existing user account. If there is an existing user account, no account is created.

If the person does not have an existing user account, then a user account in FND_USER with generated user name, password, and person attributes in the customer

field is created and an email is sent to the user about their newly created user account.

You must have set the Generate User Name Automatically profile option to **Yes**. Otherwise, this concurrent process is not available.

Email address must exist for a person in order to create an account or user name.

Person ID Group: Values are people who are part of the person ID group

E.7 Program Structure and Planning Concurrent Processes

The Program Structure and Planning concurrent processes are basic rollover processes and summary reports related to programs, units, unit sections, unit sets, catalogs, schedules, and their attributes.

Some of the Program Structure and Planning concurrent processes are intended to be run infrequently for the purposes of creating new teaching period details or monitoring current details. You can supplement these reports with user-designed, user-specific reports through Oracle Discoverer or Oracle Reports.

Export Setup Data for Scheduler

This concurrent process produces a text file containing information about preferred regions, buildings, rooms, and locations. This data is used by non-Oracle software for creating schedules.

Column Separator: Indicate whether the separator is a comma or semi-colon. This is to separate the values in a flat file.

Get Scheduled Interface Data

This concurrent process imports meeting days and effective dates for To Be Announced unit section occurrences from the interface table and creates a log file for the data being imported. This concurrent process also retrieves data from the interface table and passes the data to Oracle Student System to update class information.

There are no parameters for the Get Scheduled Interface Data concurrent process.

Initiate Scheduling of Unit Section Occurrences

This concurrent process passes scheduling data to the third party scheduling software.

Teaching Period: User-defined teaching calendar. Select the teaching period associated with the unit section occurrence for which you need to initiate scheduling.

Schedule Type: Specify whether you want to cancel a scheduled unit section occurrence and reschedule unit section occurrences or to schedule active and unscheduled unit section occurrences only.

Run Purge Job: Select this parameter to remove all scheduling data with Complete transaction status from the scheduling interface table.

Purge Scheduling Interface Data

This concurrent process removes data from the interface table. It removes unit section occurrence interface data for past, present, and future teaching periods. However, for the future and current calendars, the concurrent process removes scheduled data only for unit section occurrences with completed transaction.

Teaching Period: Remove all the interface data for past, present and future teaching calendar regardless of whether the unit section occurrence is scheduled.

Schedule Rollover Process

This concurrent process defines and schedules the rollover of schedule definitions and notes.

Existing Schedule Version: Existing schedule version

New Schedule Version: New schedule version

Override Flag: If selected, then existing catalog settings are overridden

Debug Flag: If selected, then error log file is created

Delete Reserved Seating Priorities

This concurrent process deletes all priorities for unit sections in the teaching period.

You can delete reserved seating for all units offered by an organization by specifying organizational unit, for specific units offered by an organization by specifying an organizational unit and unit, or for units regardless of organization by specifying a unit only.

Note: To run the concurrent process, you must specify either the organizational unit or unit code. Running this concurrent process disables the **Reserved Seating Allowed** check box in the Unit Section Enrollment Limits, Waitlist, and Reserved Seating windows.

Teaching Period: Teaching period for which you want to delete reserved seating priorities. Example of teaching periods can be 10-Feb-2004 - 30 - July - 2004

Organizational Unit: Organizational unit for which you want to delete the reserved seating priorities.

Unit Code: The unique code attached to a unit. For example, 1 Research Unit for Pre Enrollment.

Version Number: Unit version number

Location Code: Unit-specific location code

Unit Class: High level time marker or section number. Examples include Day, Evening, and A1.

Unit Mode: Manner in which unit can be studied

Instructor Time Conflict Report

This concurrent process checks for any time conflicts in an instructor's scheduled teaching responsibility.

Runtime Comment: Comment that appears on the header page of the report

Term: Academic term for which report is to be run

Instructor Name: Instructor's name

Check Exceeded Staff Workload

This concurrent process checks if the workload assigned to a staff member is within the expected workload limit. This concurrent process also triggers the Exceed Workload business event which automatically sends a notification to the fee administrator with the list of staff members with exceeded workload. When the fee administrator user receives the notification, that person can remove tasks for the staff members or override the expected workload for the staff members.

This notification is mainly be used to handle cases when the staff's employment category has changed, hence the current workload has now exceeded the expected workload for the new employment category.

Calendar: Specify the calendar category for which you want to check expected workload assignments for a staff member

Program Data Report - Basic

This concurrent process creates a report that lists the details of all the existing programs. You can run this concurrent process before creating new programs. Run this concurrent process annually.

Runtime Comment: Comment that appears on header page of report

Academic Calendar Instance: Academic calendar instance

Organizational Unit Member Type: Member type to which organizational unit belongs: external organization, internal organization, or professional school

Responsible Organizational Unit: Organizational unit responsible for program version or unit set

Program Status1, 2, 3: Specifies the status of activity or availability of program version

Program Type: User-defined classification of higher education programs

Location: Campus, study center, or other place where an institution conducts business or holds classes

Attendance Mode: Program mode of attendance: on campus and off campus

Attendance Type: Describes whether student is full-time or part-time, based on study load

Owning Organizational Unit: Organizational unit which owns maximum responsibility for the program version

Sort By: Sort order of program versions: sort by organizational unit code, program code and program version number

Program Listing Report

This concurrent process creates a report that lists existing program versions and their statuses.

Runtime Comment: Comment that appears on header page of report

Academic Calendar Instance: Academic calendar instance

Responsible Organizational Unit: Organizational unit responsible for program version or unit set

Owning Organizational Unit: Organizational unit which owns maximum responsibility for the program version

Organizational Unit Member Type: Member type to which organizational unit belongs: external organization, internal organization, or professional school

Program Status: Specifies status of activity or availability of program version

Location: Campus, study center, or other place where an institution conducts business or holds classes

Attendance Mode: Program mode of attendance: on campus and off campus

Attendance Type: Describes whether student is full-time or part-time, based on study load

Sort By: Sort order of program versions: sort by organizational unit code, program code and program version number

Program Structure and Planning

This concurrent process produces a detailed report compiling old program codes and versions and new program codes and versions.

Runtime Comment: Comment that appears on header page of report

Old Program Code: Old program code

Old Program Version: Old program version

New Program Code: New program code

New Program Version: New program version

Review of Unit Version Creation Report

This concurrent process creates a report that lists unit version details that are not copied to a new unit version from an old unit version. This report is generated automatically if Oracle Student System cannot copy all details to a new unit version from an existing unit version.

Runtime Comment: Comment that appears on header page of report

Old Unit Code: Old unit code

Old Version Number: Old version number

New Unit Code: New unit code

New Version Number: New version number

Rollover Faculty's Assignment

This concurrent process rolls over of faculty assignments from one calendar type to another. The calendar category for the source and destination calendar types must be the same. The number of times the task can be rolled over depends on the rollover period defined in Assign/Override Faculty's Workload window. The process is run for specified person number or for all applicable person numbers.

Person Number: Instructor's identification number

Source Calendar Type: Calendar type from which workload originates

Destination Calendar Type: Calendar type to which workload is applied

Rollover Program Offering Pattern

This concurrent process creates program offering patterns for your institution or a specified organizational unit in a new calendar instance if the destination calendar exists and is active, and the source calendar type and the destination calendar type are Academic. Only **Active** calendars of the **Academic** calendar type appear in the list of values.

If program offering patterns are already rolled over to the same destination calendar in the Program Offerings window, they are not overridden.

This concurrent process is run in batch mode as needed while setting curriculum offerings for a new academic year. A new offering pattern must be created in the Basic Program Details window.

Source Calendar: Source calendar to be rolled over

Destination Calendar: Destination calendar to receive rolled over data

Organizational Unit: Organizational unit that offers program

Unit Data Report - Basic

This concurrent process creates reports on existing units and to check details on an annual basis. You should run this concurrent process before creating new units. Enter the following details to generate unit data report.

Runtime Comment: Comment that appears on the header page of the report

Academic Period: Academic period

Organizational Unit Member Type: Member type to which organizational unit belongs: external organization, internal organization, and professional school

Owning Organizational Unit: Organizational unit which owns maximum responsibility for the unit version

Unit Version Status1: Unit version status1

Unit Version Status2: Unit version status2

Unit Version Status3: Unit version status3

Unit Level: Level of unit in normal year

Location: Campus, study center, or other place where an institution conducts business or holds classes

Unit Class: High level time marker or section number, for example, Day, Evening, A1

Unit Mode: Mode by which unit can be studied; on campus, off campus

Teaching Organizational Unit: Teaching organizational unit

Sort1: First sort order of unit versions; sort by unit code or unit status

Order1: Order1; ascending or descending

Sort2: Second sort order of unit versions; sort by unit code or unit status

Order2: Order2; ascending or descending

Unit Listing Report

This concurrent process creates a list of unit versions for a specified academic calendar.

Runtime Comment: Comment that appears on the header page of the report

Academic Calendar: Twelve-month period representing cycle of academic activities

Owning Organizational Unit: Organizational unit which owns maximum responsibility for the unit version

Organizational Unit Member Type: Member type to which organizational unit belongs; external organization, internal organization, professional school

Unit Version Status1: Unit version status 1; active, inactive, or planned

Unit Version Status2: Unit version status 2; active, inactive, or planned

Unit Version Status3: Unit version status 3; active, inactive, or planned

Unit Level: Level of unit in normal year; doctoral study, masters study

Location: Campus, study center, or other place where an institution conducts business or holds classes

Unit Class: High level time marker or section number; for example, Day, Evening, A1

Unit Mode: Mode by which unit can be studied: on campus, off campus

Teaching Calendar: Teaching calendar

Teaching Organizational Unit: Teaching organizational unit

Sort1: First sort order of unit versions; sort by unit code or unit status

Order1: Order1; ascending or descending

Sort2: Second sort order of unit versions; sort by unit code or unit status

Order2: Order2; ascending or descending

Update Last Enrolled and Offered Calendar for Units

This concurrent process calculates the last calendar enrolled and the last calendar offered. The process provides a history of the teaching period spanning the load calendar.

Load Calendar: Load calendar up to which update process is run

Catalog Rollover Concurrent Process

This concurrent process defines and schedules the rollover of catalog definitions and notes from a previous academic calendar.

Existing Catalog Version: Existing catalog version

New Catalog Version: New catalog version

Override Flag: If selected, overrides the existing catalog settings

Debug Flag: If selected, creates an error log file

Rollover Unit Offering Pattern and Unit Section Concurrent Process

This concurrent process creates unit offering patterns, unit sections, assessment items, and waitlist attributes in a new calendar instance for one or more organizational units. The destination calendar must exist and be **Active**, and the source calendar type and the destination calendar type must be **Teaching**.

If unit sections and unit offering patterns are already rolled over to the same destination calendar in the Unit Offerings window, they are not overridden, but

merge with the patterns and options created by this concurrent process. The data that is rolled over into a new unit offering pattern is listed in the Program Unit Rollover Processes report.

The Rollover Unit Offering Pattern and Unit Section concurrent process is run in batch mode by a Program Structure and Planning specialist as needed while setting curriculum for a new teaching period. A new version of a unit must be created in the Basic Unit Details window.

Source Calendar: Source calendar to be rolled over

Destination Calendar: Destination calendar to receive rolled over data

Organizational Unit: Organizational unit that offers the program

Unit Section Rollover Exception Report - Landwide

This concurrent process identifies the unit sections which fail the rollover process and to generate a report on such unit sections. The report provides unit sections details, such as the unit code, versions number and the total number of such unit sections.

Runtime Comment: Add any additional comment while running the process. This is an optional parameter

Log Creation Date: Specify the date on which the Rollover Program Offering Pattern concurrent process was last executed. This is a mandatory parameter

Organization Unit: Select the organization unit associated with the unit sections for which you want to generate the exception report

E.8 Admissions Rollover Processes

Admissions concurrent processes roll over setup from one calendar to the next. You can quickly setup future admission periods with the same information as the current admission period. This is useful if there are not many changes between admission periods. You can always manually add the differences between the admission periods.

Rollover Admission Period

This concurrent process reproduces admission period details, including admission category, process type, and program offering option restrictions, in a future academic period by attaching them to an existing admission calendar.

You must run the Calendar Rollover concurrent process to create admission periods that can be rolled in this concurrent process. You must also run the Program Structure Rollover concurrent process to roll over programs to future admission calendars. After these concurrent processes are run, you can run the Rollover Admission Period concurrent process.

You must enter academic period which is a mandatory parameter. Only **Planned** or **Active** instances and admission periods without program offering restrictions can be rolled over.

This concurrent process produces a log file of exceptions encountered during the rollover process. The log file is viewed by running the Admission Calendar Rollover Report.

Academic Period: Academic period to which details for all active admission periods are rolled over

Admission Category: Admission category to be rolled over. Admission period details must be rolled over for all categories. If one admission category is rolled over, and other admission categories are rolled over later, the first admission category appears as an exception in the log file.

Admission Calendar Rollover Report

This concurrent process creates a report that lists all the admission categories rolled over from one admission calendar to a new admission calendar within the same academic period. This report also displays exceptions in the Admission Calendar Rollover process with the reasons for no rollover of these admission categories.

The Admission Calendar Rollover Report also displays process types, locations, attendance modes and types.

To generate this report, you must first run the Admission Calendar Rollover concurrent process in batch mode or online.

Runtime Comment: Comment that appears in report header

Log File Creation Date: Defaults to most recent log file. Previous log files can be accessed from the list of values.

E.9 Records Concurrent Process Configuration

Configure Records concurrent processes to produce documents with the design that you want.

E.9.1 Configuring Printing to Produce Transcripts

The transcript reports for the Product Transcripts - US Concurrent Process and the Product Transcripts - UK Concurrent Process print in bit map mode to support the exact format required. Bit map reports require some configuration for printers before they can be printed properly.

You can configure the printer to print different styles. For example, on your printed transcript, you can configure the printer to print bold or underlined text.

Prerequisites

In the Solaris platform, the file `/etc./printers.conf` of the server on which the concurrent process is running should have the following entry for the printer:

```
<Printquename>:\
:bsdaddr=<printquename>,print,Solaris:
```

You must open the file and check to ensure that an entry for the printer exists in the above mentioned format. If not, you must either create an entry or modify the entry in above mentioned format.

E.9.1.1 Creating a Driver

Every printer registered with Oracle Applications needs to be associated with a printer type. Printer types are associated with a style and a driver.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Driver

Steps

1. Create a driver with arguments (In the lower block):

```
lp -d $PROFILES$.PRINTER $PROFILES$.FILENAME
```

E.9.1.2 Creating a Style

Create a style to determine the orientation of the page. For the transcript reports, create a portrait orientation.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Style

Note: The Orientation for the transcript reports (IGSASP26 and IGSASP27) is Portrait. Create the style with an orientation of Portrait.

E.9.1.3 Creating a Type

Create a type to associate with the printer.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Type

Steps

Create a type.

Attach the driver and style that you just created to the type.

E.9.1.4 Attaching the Type to the Driver

You must attach the type that you created to the driver and style that you created.

Responsibility

Oracle System Administrator

Navigation

Install > Printer > Register

Steps

1. Create a new printer or select your printer.
2. Attach the printer type you created to the printer.

E.9.1.5 Making changes in APPLSYS.env File

Make the following changes:

- DISPLAY= IP address of the concurrent manager server

And example of this is:

144.25.77.159:23.0

- export DISPLAY
- ORACLE_LOCALPREFERENCE=/home/applrt
- export ORACLE_LOCALPREFERENCE

E.9.1.6 Bounce the Concurrent Manager and Form Server

You must stop and restart the concurrent manager process and form server to make the latest changes effective. If you do not do this, the information is picked from the cache.

E.10 Student Finance Concurrent Process

Roll over fee data from one period to another.

Fee Rollover

The Fee Rollover concurrent process rolls over reference and operational fee data from one period to another, depending on a previous fee calendar rollover, and creates a set of structural fee data for each year a rollover occurs.

The Fee Rollover process is not available if the **Manage Accounts** field in the System Options window is set to **Null** (blank) or **Others**.

Rollover Fee Type Calendar Instances: Fee type calendar instances to be rolled over

Rollover Fee Category Calendar Instances: Fee category calendar instances to be rolled over

Rollover Source Calendar Instance: Fee period to be rolled over

Rollover Destination Calendar Instance: Target fee period in future

Fee Type: Fee type to be rolled over

Fee Category: Fee category and associated liabilities to be rolled over

Fee Type Calendar Instance Status: Fee type status in target fee period; can be Active, Planned, or All; default setting, All, sets target status to status defined in source data

Fee Category Calendar Instance Status: Fee category status in target fee period; can be Active, Planned, or All; default setting, All, sets target status to status defined in source data

Fee Category Fee Liability Status: Fee liability status in target fee period; can be Active, Planned, or All; default setting, All, sets target status to status defined in source data

By default, the following data is rolled over:

- All active fee types
- All active fee categories
- All active fee liabilities
- All related data, including triggers, calculation data, including rates, element ranges, and load apportionment, and schedules, including payment, retention, and encumbrances

To roll over only fee types without corresponding fee liabilities, Rollover Fee Type Calendar Instances is selected and Rollover Fee Category Calendar Instances is not.

To roll over only one fee type, both the Rollover Fee Type Calendar Instances and the Rollover Fee Category Calendar Instances parameters are selected, the fee type is entered in the Fee Type field, and All is selected in the Fee Category field.

Contract data is not rolled over. Data rolled over can have a **Planned** or an **Active** status.

A separate rollover is required for each fee period. For example, if first semester, second semester, summer semester, and full-year fee periods are created in 2004, each must be rolled over for 2005.

Before this concurrent process can be performed, a calendar rollover must be initiated from the Calendar Types window. An academic calendar rollover in the Calendar Types window rolls over all financial and fee calendars. The calendar status must be changed from **Planned** to **Active** if active fee data must be rolled over.

Before active fee data can be rolled over, account codes for financial calendars must be created in the Fee Posting Accounts window. For planned fee data, account codes can be created when fee data is made active.

Fee assessment rates must be rolled over into the new fee period without changes and revised before the first assessment.

The Fee Rollover concurrent process is run in batch mode only by a student fees specialist yearly for planned fee structures, and can be rolled over several years in advance.

The Rollover Calendar Instance window initiates this concurrent process. The Fee Structure Rollover Report is generated, indicating whether the concurrent process was successful.

E.11 Financial Aid Concurrent Processes

Financial Aid concurrent processes roll over fund and sponsor setup from one award year to the next.

Awards - Rollover Fund Attributes Concurrent Process

During setup, you define attributes for funds in the Fund Manager window. You can roll over fund attributes from an existing award year to a new award year either by using the Fund Rollover window or the Awards - Rollover Fund Attributes concurrent process.

You can run the concurrent process for one fund at any time. The new fund inherits all the properties of the selected fund, except term, teaching period, and disbursement plan related information.

Fund attributes must be defined before you can run this concurrent process.

Award Year: Award year to be rolled over

Fund Code: Fund code to be rolled over

Sponsor Rollover Concurrent Process

This concurrent process rolls over sponsorship details to the following award year.

Award Year: Award year

Person Number: Person number

Person Group: Person group

Fund Code: Fund code

Term Calendar: Term calendar

E.12 UCAS Concurrent Processes

For UCAS there are a number of concurrent processes that need to be run during configuration. These can be run before, in the middle of, or after the other concurrent processes.

See Chapter 25, "UCAS" for information about the Start UCAS Cycle and Configure System for UCAS Cycle concurrent processes.

See *Oracle Student System User Guide* for information about the Load HERCULES Data, Process UCAS Data, and Load GTTR Degree Subjects (Request Set) concurrent processes.

Start UCAS Cycle

This concurrent process creates initial control records for a UCAS Cycle. On first execution, the cycle that is opened is the cycle prior to the maximum supported cycle. This is currently 2003. If the current cycle is 2004, then this concurrent process should be run twice. When support for 2005 is shipped, the first cycle opened will be 2004.

There are no parameters.

Configure System For UCAS Cycle

This concurrent process uses the database link to connect to HERCULES and configures Oracle Student System to work with the selected cycles database structures and processing requirements.

Cycle: This is the cycle for which the system should be configured.

Database Link: This is the name of the database link created to the DBA to connect to the UCAS HERCULES Interface.

Load HERCULES Data

This concurrent process downloads data from the UCAS HERCULES interface and inserts it into Oracle Student System UCAS Interface tables ready for processing.

Load Reference Data: Enter **Yes** to load reference data defined by UCAS and which can be updated over time.

Load External Reference Data: Enter **Yes** to load reference data defined by other bodies and which are static lists.

Load Application Data: Enter **No**. Loading of application data is not part of set up and other set up actions need to be performed before application data can be loaded and processed.

Process UCAS Data

This concurrent process validates the data downloaded from HERCULES and loads it into the Oracle Student System UCAS tables.

Process Reference Data: Enter **Yes** to process the downloaded reference data.

Process Application Data: Enter **No**. Processing of application data is not part of set up and other set up actions need to be performed before application data can be loaded and processed.

Load GTTR Degree Subjects (Request Set)

This concurrent process should only be run by institutions using the GTTR Admissions System. The process loads the degree subjects into the Oracle Student System UCAS Reference Data tables.

File Name: Enter the directory path and file name of the GTTR Degree Subjects file. This file can be downloaded from the UCAS ftp server.

Window Number Reference

F.1 Windows and Window Numbers

The following table lists the window names and the corresponding reference numbers in Oracle Student System.

Table F–1 *Window Reference Table*

Window Name	Window Reference Number	Subsystem
Admissions Conditional Offer Status	IGSAD011	Admissions
Admissions Outcome Status	IGSAD010	Admissions
Account Hierarchy	IGSFI057	Student Finance
Account Hierarchy: Account Hierarchy Order	IGSFI058	Student Finance
Activity Type	IGSPS117	Program Structure and Planning
Administrative Unit Statuses	IGSEN001	Enrollment
Admission Application Note Types	IGSAD067	Admissions
Admission Calendar Configuration	IGSAD018	Admissions
Admission Category	IGSAD036	Admissions
Admission Codes	IGSAD003	Admissions
Admission Entry Qualification Status	IGSAD007	Admissions
Admission Fee Information	IGSAD058	Admissions

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Admission Fee Status	IGSAD006	Admissions
Admission Offer Deferment Status	IGSAD013	Admissions
Admission Offer Response Status	IGSAD012	Admissions
Admission Period Calendars	IGSAD043	Admissions
Admission Period Date Overrides	IGSAD044	Admissions
Admission Process Category Detail	IGSAD037	Admissions
Admission Process Category Tracking Rule	IGSAD079	Admissions
Admission Processing Status	IGSAD005	Admissions
Admission Test Types	IGSAD025	Admissions
Admission Unit Outcome Status	IGSAD008	Admissions
Advanced Standing Configuration Details	IGSAV001	Records: Advanced Standing
Anonymous Grading Method	IGSAS038	Records: Assessments
Applicant Goals	IGSAD058	Admissions
Application Completion Status	IGSAD009	Admissions
Application Detail Codes	IGSAD058	Admissions
Application Hierarchies	IGSFI053	Student Finance
Application Review Profile	IGSAD089	Admissions
Apply Unit Sets to Program Offerings	IGSPS066	Program Structure and Planning
Approved Assessment Item Grading Schema	IGSAS037	Records: Assessments
Assessment Calendar Configuration	IGSAS008	Records: Assessments
Assessment Items	IGSAS009	Records: Assessments
Assessment Items - Complete List of All Assessment Item Examination Materials	IGSAS010	Records: Assessments

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Assessment Type Government Score Mapping	IGSAD022	Admissions
Assessment Types	IGSAS001	Records: Assessments
Assessor Types	IGSAS004	Records: Assessments
Asset Protection Allowance	IGFAP042	Financial Aid
Assign Enrollment Session Timeslots	IGSEN049	Enrollment
Assign/Override Faculty Workload	IGSPS129	Program Structure and Planning
Attendance Entry Configuration Setup	IGSAS033	Records: Assessments
Attendance Type	IGSPS006	Program Structure and Planning
Award Ceremony	IGSGR008	Records: Graduation
Award Groups	IGFAW011	Financial Aid
Award Revision Reasons	IGFAW024	Financial Aid
Awards	IGSPS008	Program Structure and Planning
Balance Rules	IGSFI044	Student Finance
Basic Program Details	IGSPS013	Program Structure and Planning
Basic Unit Details	IGSPS047	Program Structure and Planning
Basic Unit Set Details	IGSPS065	Program Structure and Planning
Basis for Admission Types	IGSAD002	Admissions
Batch Year Mappings	IGFAP018	Financial Aid
Buildings	IGSPS098	Organizational Structure
Calendar Relationships	IGSCA004	Calendar
Calendar Statuses	IGSCA001	Calendar
Calendar Types	IGSCA002	Calendar
Career Program/Unit Relationship	IGSPS123	Records: Academic Statistics

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Catalog Definition	IGSPS096	Program Structure and Planning
Catalog Notes	IGSPS097	Program Structure and Planning
Class Rank Cohorts	IGSPR024	Records: Academic Statistics
Class Standing	IGSPR015	Records: Academic Statistics
Class Standing Schedule	IGSPR016	Records: Academic Statistics
Commonline Loan Setup	IGFSL004	Financial Aid
Configure Enrollment Credit Points	IGSEN075	Enrollment
Contribution Payment Options	IGSEN007	Enrollment
Correspondence Categories	IGSCO002	Correspondence
Correspondence Types	IGSCO001	Correspondence
Cost of Attendance Assignment	IGFAW005	Financial Aid
Cost of Attendance Items	IGFAW002	Financial Aid
Credential Ratings	IGSAD058	Admissions
Credential Types	IGSGR004	Records: Graduation
Credential Types Setup	IGSAD066	Admissions
Credit Type	IGSFI050	Student Finance
Curriculum Units	IGSPS104	Program Structure and Planning
Dale Alias Instance Offset Constraints	IGSCA010	Calendar
Date Alias Categories	IGSCA005	Calendar
Date Alias Instance	IGSCA008	Calendar
Date Alias Offset Constraints	IGSCA007	Calendar
Date Aliases	IGSCA006	Calendar
Date Aliases Instances	IGSCA009	Calendar
Define Extract Criteria	IGSHE007	HESA
Define To Do List	IGFAP027	Financial Aid

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Definition of System Details	IGSUC032	UCAS
Degree Codes	IGSPS093	Program Structure and Planning
Delivery Method Types	IGSAS066	Records: Order Documents
Dictionary of Occupational Titles	IGSPS070	Program Structure and Planning
Direct Loan	IGFSL003	Financial Aid
Disciplines	IGSPS040	Program Structure and Planning
Discontinuation Deadline Date Offset Constraints	IGSEN056	Enrollment
Discontinuation Reason Codes	IGSEN017	Enrollment
Document Requirement Processing Steps	IGSAS067	Records: Order Documents
Element Ranges	IGSFI020	Student Finance
Enrollment Calendar Configurations	IGSEN016	Enrollment
Enrollment Categories	IGSEN009	Program Structure and Planning
Enrollment Category Procedure Detail	IGSEN010	Enrollment
Enrollment Category Validation Setup	IGSEN058	Enrollment
Enrollment Deadline Offset Constraints	IGSEN055	Enrollment
Enrollment Deadlines	IGSPS101	Enrollment
Enrollment Method Types	IGSEN015	Enrollment
Enrollment Note Types	IGSEN021	Enrollment
Examination Material Types	IGSAS003	Records: Assessments
Examination Sessions	IGSAS021	Records: Assessments
Examination Supervisor Details	IGSAS020	Records: Assessments
Examination Supervisor Types	IGSAS002	Records: Assessments

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Notes	IGSGE006	NA
Expected Workload	IGSPS126	Program Structure and Planning
Expected Workload Override Reason	IGSPS128	Program Structure and Planning
Export Applications to OSS	IGSUC007	UCAS
Faculty Tasks	IGSPS127	Program Structure and Planning
Federal Stafford Loan Limits	IGFAW021	Financial Aid
Fee Assessment Rates	IGSFI021	Student Finance
Fee Categories	IGSFI019	Student Finance
Fee Category Calendar Instance: Fee Trigger Group	IGSFI017	Student Finance
Fee Category Calendar Instance: Program Fee Trigger	IGSFI015	Student Finance
Fee Category Calendar Instance: Program Fee Trigger	IGSFI015	Student Finance
Fee Category Calendar Instance: Program Group Fee Trigger	IGSFI014	Student Finance
Fee Category Calendar Instance: Program Type Fee Trigger	IGSFI013	Student Finance
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance
Fee Category Calendar Instance: Unit Fee Trigger	IGSFI016	Student Finance
Fee Category Calendar Instance: Unit Set Fee Trigger	IGSFI018	Student Finance
Fee Category Calendar Instance: Unit Set Fee Trigger	IGSFI018	Student Finance
Fee Posting Accounts	IGSFI004	Student Finance

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Fee Structure Statuses	IGSFI001	Student Finance
Fee Type	IGSFI012	Student Finance
Ancillary Rates	IGSFI040	Student Finance
Ancillary Segments	IGSFI039	Student Finance
Fields of Study	IGSPS004	Program Structure and Planning
Finance and Late Charge Plan	IGSFI067	Student Finance
Financial Aid Attendance Type Mapping	IGFAP032	Financial Aid
Financial Aid Career Level Mapping	IGFAW037	Financial Aid
Financial Aid Class Standing Mapping	IGFAP033	Financial Aid
FISAP Income Levels	IGFAW033	Financial Aid
Form Configuration	IGSPE050	Person
FTE Calendars	IGSHE015	HESA
Fund Calendar Relations	IGFAW018	Financial Aid
Fund Code	IGFAW009	Financial Aid
Fund Manager	IGFAW010	Financial Aid
Fund Pays Only Fee Classes	IGFAW042	Financial Aid
Fund Pays Only Programs	IGFAW040	Financial Aid
Fund Pays Only Units	IGFAW041	Financial Aid
Fund Rollover	IGFAW019	Financial Aid
Fund To Do Items	IGFAW043	Financial Aid
Fund Types	IGFAW008	Financial Aid
Funding Sources	IGSPS010	Program Structure and Planning
Government Admission Codes	IGSAD004	Admissions
Government Attendance Types	IGSST010	Program Structure and Planning

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Government Basis for Admission Types	IGSST009	Admissions
Government Contribution Payments	IGSEN006	Enrollment
Government Discipline Groups	IGSST007	Program Structure and Planning
Government Field of Study	IGSST003	Program Structure and Planning
Government Funding Sources	IGSST006	Program Structure and Planning
Government Levels of Completion	IGSAD020	Admissions
Government Levels of Qualification	IGSAD019	Admissions
Government Program Attendance Modes	IGSST011	Program Structure and Planning
Government Program Types	IGSST001	Program Structure and Planning
Government Secondary Assessment Types	IGSAD023	Admissions
Government Snapshot Control	IGSST018	Enrollment
Government Socio-Economic Objective Classifications	IGSRE008	Research
Government Special Program Types	IGSST002	Program Structure and Planning
Government Type of Activity Classification Codes	IGSRE010	Research
Grade Conversion	IGSAD068	Admissions
Grading Schema Grade Translations	IGSAS026	Records: Assessments
Grading Schemas	IGSAS025	Records: Assessments
Graduand Approval Statuses	IGSGR002	Records: Graduation
Graduand Statuses	IGSGR001	Records: Graduation
Graduation Ceremony	IGSGR007	Records: Graduation
Graduation Ceremony Notes	IGSGR010	Records: Graduation

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Graduation Note Types	IGSGR003	Records: Graduation
Guarantor Codes	IGFSL002	Financial Aid
HESA Codes	IGSHE001	Enrollment
HESA Data Set	IGSHE001	Hesa
Holds Plans	IGSFI068	Student Finance
Import Parameters	IGFAP002	Financial Aid
Income Protection Setup	IGFAP043	Financial Aid
Incomplete Grade Conversion System Profile Setup	IGSAS034	Records: Assessments
Inquirer Information	IGSAD058	Admissions
Inquiry Characteristic Types	IGSAD028	Inquiry
Inquiry Information Types	IGSAD027	Inquiry
Inquiry Package Items	IGSAD030	Inquiry
Inquiry Source Types	IGSAD026	Inquiry
Inquiry Status	IGSAD029	Inquiry
Institution Statistic Type Configuration	IGSPR019	Records: Academic Statistics
Institution Waitlist Options	IGSEN045	Enrollment
Institutional Application	IGFAP010	Financial Aid
Institutions	IGSOR029	Organizational Structure
Interests	IGSAD058	Admissions
Intermission Types	IGSEN068	Enrollment
International Currency Codes	IGSFI002	Student Finance
Lender Codes	IGFSL001	Financial Aid
Lender Relations	IGFSL011	Financial Aid
Load Calendar Structure	IGSEN013	Enrollment
Load Calendar Structure	IGSEN019	Enrollment

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Location	IGSOR031	Organizational Structure
Location Accounts	IGSFI063	Student Finance
Low Tuition and Fees Codes	IGFGR009	Financial Aid
Maintain Code Associations	IGSHE002	HESA
Maintain Code Mappings	IGSHE003	HESA
Maintain Codes	IGSHE001	HESA
Maintain Group Rules	IGSRU002	Rules
Maintain Job Text	IGSGE008	NA
Maintain Rule	IGSRU001	Rules
Maintain System Messages	IGSGE003	NA
Mapping Attributes	IGSCO014	Correspondence
Mark/Grade Entry Configuration	IGSAS005	Records: Assessments
Match Criteria Sets	IGSPE022	Person
Matching Criteria	IGFAP023	Financial Aid
Measurements	IGSGR006	Records: Graduation
Media and Equipment	IGSPS080	Program Structure and Planning
Meet with Classes	IGSPS110	Program Structure and Planning
Meet with Exams Group	IGSPS111	Program Structure and Planning
Milestone Statuses	IGSRE011	Research
Milestone Types	IGSRE001	Research
National Student Clearinghouse Configuration	IGSEN074	Enrollment
Need Analysis Methodology Types	IGFAP039	Financial Aid
Nominated Completion Period	IGSEN073	Enrollment
Non-Standard Unit Section Discontinuation Deadline Calculation	IGSEN054	Enrollment

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Non-Standard Unit Section Enrollment Deadline Setup	IGSEN053	Enrollment
Occupational Titles and Related Programs	IGSPS072	Program Structure and Planning
Open/Close Accounting Periods	IGSFI071	Student Finance
Organization Accounts	IGSFI062	Student Finance
Organization Structure Data Setup	IGSOR032	Organizational Structure
Organization Unit Reserved Seating	IGSPS105	Enrollment
Organization Unit Statistic Type Configuration	IGSPR020	Records: Academic Statistics
Organizational Structure Setup	IGSOR028	Organizational Structure
Organizational Unit Progression Configuration	IGSPR004	Progression
Organizational Unit Relationships	IGSOR015	Organizational Structure
Organizational Unit Student Targets	IGSAD041	Admissions
Organizational Unit Waitlist Setup	IGSEN046	Enrollment
Organizational Units	IGSOR030	Organizational Structure
Overseas Secondary Education Qualification	IGSAD024	Admissions
Packaging Parameters	IGFAW014	Financial Aid
Patterns of Study	IGSPS034	Program Structure and Planning
Pell Alternate Schedule Setup	IGFGR008	Financial Aid
Pell Matrix	IGFGR006	Financial Aid
Pell Setup	IGFGR003	Financial Aid
Person Data Setup	IGSPE052	Person
Person Details	IGSPE034	Person
Person Hold Types	IGSEN042	Person

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Person ID Group Definitions	IGSPE001	Person
Person ID Group Enrollment Setup	IGSEN077	Enrollment
Personal Statement Types	IGSAD086	Admissions
Primary Program Setup	IGSPS122	Program Structure and Planning
Probability Details	IGSAD058	Admissions
Program & Unit Note Types	IGSPS069	Program Structure and Planning
Program Accounts	IGSFI059	Student Finance
Program Alternative Exits	IGSPS016	Program Structure and Planning
Program Annual Load	IGSPS025	Program Structure and Planning
Program Attendance Modes	IGSPS005	Program Structure and Planning
Program Awards	IGSPS017	Program Structure and Planning
Program Categories	IGSPS003	Program Structure and Planning
Program Categorizations	IGSPS019	Program Structure and Planning
Program Default Research Milestones	IGSRE014	Research
Program Entry Point Reference Codes	IGSPS033	Program Structure and Planning
Program Fields of Study	IGSPS018	Program Structure and Planning
Program Group Membership	IGSPS015	Program Structure and Planning
Program Group Types	IGSPS007	Program Structure and Planning
Program Groups	IGSPS012	Program Structure and Planning
Program Occupational Titles	IGSPS071	Program Structure and Planning
Program Offering Notes	IGSPS031	Program Structure and Planning
Program Offering Option	IGSPS032	Program Structure and Planning
Program Offering Option Admission Categories	IGSPS030	Program Structure and Planning
Program Offering Option Notes	IGSPS036	Program Structure and Planning

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Program Offering Option Unit Sets	IGSPS022	Program Structure and Planning
Program Offering Pattern Notes	IGSPS038	Program Structure and Planning
Program Offering Patterns	IGSPS037	Program Structure and Planning
Program Offering Unit Set Relationships	IGSPS021	Program Structure and Planning
Program Offering Unit Sets	IGSPS020	Program Structure and Planning
Program Offerings	IGSPS029	Program Structure and Planning
Program Ownership	IGSPS014	Program Structure and Planning
Program Pattern of Studies	IGSPS035	Program Structure and Planning
Program Reference Codes	IGSPS023	Program Structure and Planning
Program Stage Types	IGSPS028	Program Structure and Planning
Program Stages	IGSPS026	Program Structure and Planning
Program Statuses	IGSPS009	Program Structure and Planning
Program Student Targets	IGSAD042	Admissions
Program Type Groups	IGSPS002	Program Structure and Planning
Program Types	IGSPS001	Program Structure and Planning
Program Unit Levels	IGSPS050	Program Structure and Planning
Program Version Notes	IGSPS027	Program Structure and Planning
Program Version Progression Configuration	IGSPR003	Progression
Program Version Rules	IGSPS039	Program Structure and Planning
Programs Eligible for Financial Aid	IGSPS073	Program Structure and Planning
Progression Rule Application	IGSPR007	Progression
Progression Rule Category	IGSPR001	Progression
Progression Rule Outcome	IGSPR009	Progression
Progression Rule Outcome Type	IGSPR008	Progression
Progression Rule Summary	IGSPR014	Progression

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Progression Rules	IGSPR006	Progression
Rating Scales	IGSAD059	Admissions
Recruitment Information	IGSAD058	Admissions
Reference Code Types	IGSPS011	Program Structure and Planning
Refund Tolerance Limits	IGSFI065	Student Finance
Relationships	IGSOR012	Organizational Structure
Research Calendar Configuration	IGSRE012	Research
Research Supervisor Types	IGSRE002	Research
Restricted Funding Sources	IGSPS024	Program Structure and Planning
Retention Schedules	IGSFI024	Student Finance
Rollover Calendar Instance	IGSCA003	Calendar
Rooms	IGSPS099	Organizational Structure
Scholarship Type	IGSRE006	Research
School Applying To	IGSAD082	Admissions
Secondary Education Assessment Types	IGSAD021	Admissions
Secondary Education Schools	IGSAD014	Admissions
Self Service Application Types	IGSAD085	Admissions
Self Service Enrollment Setup	IGSEN063	Enrollment
Self Service User Activity Setup	IGSEN057	Enrollment
Servicer Codes	IGFSL010	Financial Aid
Setup Inquiry Entry Levels	IGSAD077	Inquiry
Setup Inquiry Entry Status	IGSAD075	Inquiry
Setup Inquiry Program Details	IGSAD074	Inquiry
Setup Inquiry Unit Set Details	IGSAD076	Inquiry
Setup Self Service Inquiry Configuration	IGSAD078	Inquiry

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Socio-Economic Objective Classifications	IGSRE009	Research
Source Categories	IGSAD055	Admissions
Source Types	IGSPE021	Person
Special Consideration Category	IGSAS006	Records: Assessments
Special Consideration Outcome	IGSAS007	Records: Assessments
Special Requirements	IGSPS062	Program Structure and Planning
Sponsor Setup	IGFSSP001	Financial Aid
State & Other Tax Allowance	IGFAP040	Financial Aid
State Codes	IGSPE010	Person
Student External and Internal Job Setup	IGFSE001	Financial Aid
Student Statistics Types	IGSPR018	Records: Academic Statistics
Student Target Types	IGSAD039	Admissions
Submission Student Targets	IGSAD040	Admissions
Submissions	IGSHE006	HESA
Supervisors To Venue	IGSAS022	Records: Assessments
System Advanced Standing Types	IGSAV002	Records: Advanced Standing
System Hold Effect Type	IGSEN041	Person
System Options	IGSFI037	Student Finance
System Progression Configuration	IGSPR002	Progression
Teaching Period Codes	IGSAD017	Calendar
Teaching Responsibility	IGSPS048	Program Structure and Planning
Teaching Responsibility Override	IGSPS059	Program Structure and Planning
Tertiary Education Level of Completion	IGSAD016	Admissions
Tertiary Level of Qualification	IGSAD015	Admissions

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Test Result Information	IGSAD058	Admissions
Text Notes	IGSGE004	NA
Thesis Exam Types	IGSRE004	Research
Thesis Panel Member Types	IGSRE005	Research
Thesis Panel Types	IGSRE003	Research
Thesis Result Codes	IGSRE007	Research
Timeslot Calendar Configuration	IGSEN052	Enrollment
Timeslot Setup	IGSEN048	Enrollment
Tracking Group Membership	IGSTR009	Tracking
Tracking Groups	IGSTR005	Tracking
Tracking Note Types	IGSTR004	Tracking
Tracking Status	IGSTR003	Tracking
Tracking Step Catalog	IGSTR011	Tracking
Tracking Type Step Notes	IGSTR002	Tracking
Tracking Types	IGSTR001	Tracking
Transcript Information	IGSAD058	Admissions
Transcript Type	IGSAS032	Records: Assessments
UCAS Code Mappings	IGSUC034	UCAS
UCAS Setup	IGSUC001	UCAS
UK Statistics	IGSHE014	Program Structure and Planning
Unit Accounts	IGSFI060	Student Finance
Unit Assessment Items	IGSAS011	Records: Assessments
Unit Categories	IGSPS041	Program Structure and Planning
Unit Categorizations	IGSPS052	Program Structure and Planning
Unit Classes	IGSPS045	Program Structure and Planning
Unit Credit Points & Hours	IGSPS047	Records: Assessments

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Unit Cross-Listing Group	IGSPS112	Program Structure and Planning
Unit Disciplines	IGSPS049	Program Structure and Planning
Unit Discontinuation Date Criteria	IGSEN008	Enrollment
Unit Fields of Study	IGSPS074	Program Structure and Planning
Unit Grading Schemas	IGSPS077	Program Structure and Planning
Unit Internal Program Levels	IGSPS046	Program Structure and Planning
Unit Levels	IGSPS043	Program Structure and Planning
Unit Location and Facilities	IGSPS081	Program Structure and Planning
Unit Modes	IGSPS044	Program Structure and Planning
Unit Offering Notes	IGSPS056	Program Structure and Planning
Unit Offering Pattern Notes	IGSPS057	Program Structure and Planning
Unit Offering Pattern Reserve Seating	IGSPS106	Enrollment
Unit Offering Pattern Waitlist	IGSPS075	Enrollment
Unit Offerings	IGSPS055	Program Structure and Planning
Unit Placement	IGSAD060	Admissions
Unit Program Type Level	IGSPS108	Program Structure and Planning
Unit Reference Codes	IGSPS053	Program Structure and Planning
Unit Repeat Conditions	IGSPS078	Enrollment
Unit Repeat Families	IGSPS107	Enrollment
Unit Section Accounts	IGSFI061	Student Finance
Unit Section Assessment Items	IGSPS092	Records: Assessments
Unit Section Assessments	IGSPS090	Records: Assessments
Unit Section Categorizations	IGSPS103	Program Structure and Planning
Unit Section Credit Points	IGSPS086	Program Structure and Planning
Unit Section Credit Points - Claimable Hours only	IGSPS086	Records: Assessments

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Unit Section Cross-Listed Group	IGSPS113	Program Structure and Planning
Unit Section Details	IGSPS083	Program Structure and Planning
Unit Section Enrollment Limits & Waitlists	IGSPS085	Enrollment
Unit Section Financial Aid Eligibility	IGSPS088	Program Structure and Planning
Unit Section Grading Schemas	IGSPS082	Program Structure and Planning
Unit Section Notes	IGSPS060	Program Structure and Planning
Unit Section Occurrences	IGSPS084	Program Structure and Planning
Unit Section Occurrences Facilities	IGSPS114	Program Structure and Planning
Unit Section Reference Codes	IGSPS091	Program Structure and Planning
Unit Section Repeat Conditions -Repeat Conditions	IGSPS089	Enrollment
Unit Section Teaching Responsibilities	IGSPS116	Program Structure and Planning
Unit Section Version Rules	IGSPS102	Program Structure and Planning
Unit Sections	IGSPS058	Program Structure and Planning
Unit Set Categories	IGSPS063	Program Structure and Planning
Unit Set Ceremony	IGSGR009	Records: Graduation
Unit Set Notes	IGSPS067	Program Structure and Planning
Unit Set Pre-Enrollment Configuration	IGSPS124	Enrollment
Unit Set Rules	IGSPS068	Program Structure and Planning
Unit Set Statuses	IGSPS064	Program Structure and Planning
Unit Statuses	IGSPS042	Program Structure and Planning
Unit Subtitle	IGSPS109	Program Structure and Planning
Unit Version Notes	IGSPS054	Program Structure and Planning
Unit Version Rules	IGSPS061	Program Structure and Planning

Table F–1 (Cont.) Window Reference Table

Window Name	Window Reference Number	Subsystem
Unscheduled Contact List	IGSPS118	Program Structure and Planning
User Defined Return Class	IGSHE005	HESA
Venue Availability	IGSAS019	Records: Assessments
Venues	IGSAS017	Organizational Structure

Common Terminology

G.1 Common Terminology: An Introduction

This appendix provides detailed explanations of Oracle Student System terms. These terms cover setup issues and the Program Structure and Planning subsystem.

For subsystem specific terminology, see the glossary.

The following table describes the common terminology used in Oracle Student System.

Table G–1 *Core Terminology*

Term	Description	Example
Academic Calendar	An academic calendar is the core structure for an instructional year.	Examples include: <ul style="list-style-type: none">■ Fall 2004■ Winter 2004■ Summer 2004
Attendance Mode	<p>Students can attend classes in three different modes:</p> <ul style="list-style-type: none">■ On Campus■ Off Campus■ Composite <p>Attendance mode determines fee assessment and the number of credit points earned.</p>	Students attending classes on campus could have a higher fee assessment than students who attend classes off campus.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Awards	An award is a degree conferred at completion of program requirements.	Awards are classified into the following types: <ul style="list-style-type: none">■ Program: Bachelor of Arts■ Honorary: Non-academic degree■ Special: Medal or prize
Basic Program Details	The attributes of a program are called program details. You must define the program details to activate a program.	Examples of program details are: <ul style="list-style-type: none">■ Program code■ Title■ Version number■ Status■ Rank■ Type
Basic Unit Details	Details provided while creating a unit are called basic unit details.	Examples of basic unit details are: <ul style="list-style-type: none">■ Start Date■ Expiry Date■ Title■ Unit Status■ Unit Offering■ Unit Sections

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Basic Unit Set Details	To define a unit set, you must specify details, such as the title of the unit set, and rules governing unit sets.	<p>Examples of basic unit set details are:</p> <ul style="list-style-type: none"> ■ Start Date ■ Expiry Date ■ Title ■ Unit Status ■ Unit Offering ■ Unit Sections <p>The program BA History contains the following unit sets:</p> <ul style="list-style-type: none"> ■ Ancient Indian History ■ Medieval Indian History ■ Modern Indian History ■ Contemporary Indian History ■ South East Asian History <p>In the above unit sets, Ancient Indian History can be a major, while Contemporary Indian History can be a minor.</p>
Career	A career is a path of study consisting of individual programs that lead to a specific academic goal.	<p>Examples include careers in:</p> <ul style="list-style-type: none"> ■ Aerospace Engineering ■ International Health

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Career Class Standing	Career class standing is used to assess student progress within a career or primary program based on the total number of credit hours completed.	Examples of class standing include: <ul style="list-style-type: none"> ■ Undergraduate ■ Graduate ■ Professional
Career-centric Model	<p>A career-centric model is one of the three models for calculating student fees, attendance, and credits.</p> <p>The other two models are Primary Career and Program.</p> <p>In the career-centric model, a single program is designated as the key program for each student. All fees, attendance, and credits are calculated based on the key program.</p>	If the Department of Aerospace Engineering offers several programs of study leading to the Master of Science in Engineering - Aerospace Engineering in the career-centric model, one is selected as the key program.
Cross-Listed Unit Sections Group	A cross-listed unit section group consists of similar unit sections. Cross-listed unit section groups are used by third-party scheduling software to schedule the time, assign buildings and classrooms, and arrange for media and other equipment required by the cross-listed unit sections.	NA
Cross-Listed Units Group	<p>Cross-listed units group consists of multiple units or unit sections, that share common attributes, such as the time and place where the class is held. Cross-listed groups can be defined both at unit and unit section levels.</p> <p>Units within a cross-listed units group share common attributes, such as maximum enrollment and group override limits, calendar type, alternate code, start and end dates, and location.</p>	The unit Modern English Literature 101 can be a cross-listed unit if two programs, BA Literature and BA English. Both have Modern English Literature as part of their curriculum.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Dictionary of Occupational Titles	You can map occupational titles to programs and assign codes and alternative codes to occupational titles.	You can map the occupation Historian with the program BA History.
Discipline	<p>A discipline describes the overall field of academic learning or endeavor into which units of study are classified.</p> <p>Disciplines are subdivided into groups called discipline groups. User-defined discipline groups must be mapped to government discipline groups.</p>	<p>Discipline: Chinese History</p> <p>Discipline groups:</p> <ul style="list-style-type: none"> ■ Early Chinese Empire: 221 BC - AD 589 ■ Medieval Chinese Empire: 589 - 1644 ■ Modern China: 1644 - Present
Faculty	A faculty is full-time personnel at your institution whose regular assignments include instruction, research, and public service as a principal activity, and who hold an academic rank as professor, associate professor, assistant professor, or instructor at your institution.	NA
Fields of Study	<p>There are two types of fields of study: user-defined and government.</p> <p>A user-defined field of study permits classification of programs at a detailed level and the use of field of study names specific to your institution. Each user-defined field of study must be mapped to a more generic government field of study.</p>	<p>Given a government field of study, Animal Husbandry (0101), you map the following user-defined fields of study to it:</p> <ul style="list-style-type: none"> ■ AHDOM - Animal Husbandry - Domestic Animals ■ AHEx - Animal Husbandry - Exotic Animals

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Funding Source	<p>A funding source indicates where the funds are coming from for a particular student program attempt.</p> <p>A funding source also serves as a means of classifying programs according to the funding sources.</p> <p>You can define your own funding sources and map them to a government funding source.</p>	A student could have funding from an ethnic organization only for courses in the language and culture of the ethnic group and not for general study requirements.
Government Discipline Groups	<p>A government discipline group is a government grouping of units based on similarity of subject matter. The government body provides a set of codes and the code descriptions for each discipline.</p> <p>If your institution has pre-defined disciplines, you must map each code to the government disciplines.</p>	Given the government discipline group Chemical Sciences (0023), you map your Chemistry discipline code to it.
Government Fields of Study	<p>In some countries, such as the United Kingdom, institutions must report to the government the fields of study provided. For this purpose, you map the government field of study to the user-defined field of study.</p> <p>A government field of study is a classification of programs based on similarity in vocational specialization or principal subject matter. The government body provides a set of codes and the code descriptions for each field of study. If your institution has predefined fields of study, you must map each code to the user-defined fields of study.</p> <p>A field of study is defined at the program level and not at unit level.</p>	You can map the government field of study Accounting (0046), to the subject Accounting Practices defined by your institution.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Government Funding Sources	A government funding source is a means of classifying programs according to the primary source of funding. Each user-defined funding source must be mapped to a government funding source.	If programs funded by private companies are categorized under a single funding source, HCFA, and the government fund source code is 0012, you can map your funding source code (HCFA) to the Government Fund Source (0012).
Government Program Attendance Modes	A government program attendance mode specifies the attendance mode for a student enrolled in a program. You are required to report to the government the attendance mode of each enrolled student, and then map user-defined attendance modes to government program attendance modes.	Given the government attendance mode Internal, you map your on campus program attendance mode to it.
Government Program Type	A government program type is a logical grouping of programs. Government program types must be mapped to user-defined program types.	Given the government program type, BA History (0021), you map it to the program type that includes all of your history programs.
Institution attendance type	Student attendance type determines student charges. The institution attendance type is determined by dividing the total number of credit points for all enrolled units by the annual load for a primary career or key program.	If the attendance type for a student is Full-time, that student will have higher fees than a student whose attendance type is Half-time.
Meet with Classes Group	If two or more unit sections share common subjects, they are grouped into a meet with classes group.	If program A, B and C share a common subject English, the unit sections within those programs can be grouped together as meet with classes group.

Table G-1 (Cont.) Core Terminology

Term	Description	Example
Meet with Exams Group	<p>You can group unit sections to share common location and time for examinations. These groups are termed as meet with exam groups.</p> <p>The meet with exams group and meet with classes group do not share common attributes with cross-listed unit sections. You need to define the attributes for meet with exams groups and meet with classes groups separately.</p>	<p>If two or more unit sections share the same timetable and location, they can be grouped together as a meet with exam group.</p>
Note Type	<p>Notes can be used to attach additional information to certain data. The note type attribute allows notes to be grouped according to common characteristic.</p> <p>Notes of many types can be created, each type reflecting the purpose of the notes associated with it. Notes can be created, stored, and retrieved in text format.</p>	<p>NA</p>
Pattern of Study	<p>A pattern of study defines the predetermined unit structure in a program. Patterns of study are used to pre-enroll students in units and to advise students of unspecified unit requirements such as electives and optional units. This makes the selection of units more straightforward.</p>	<p>Students studying on campus may be offered a different pattern of units of study than those studying off campus. Full-time on campus students might be expected to complete X units spread over Y teaching periods, whereas part-time on campus and off campus students might do the same X units but over 2Y teaching periods. Different majors have different unit set requirements. These can be specified as a pattern of study.</p>

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Primary Career	<p>If a student is enrolled in multiple careers, a primary program is designated for each career and one of the primary programs is designated as the key program.</p> <p>The key program is used for assessing fees, marking attendance, and calculating credit points earned for all careers.</p>	<p>If a student enrolls in three careers: undergraduate program (BA History), a graduate program (MA History), and a doctorate (Ph.D. History), the primary programs for each career can be:</p> <p>BA History (Undergraduate)</p> <ul style="list-style-type: none"> ■ Eng 101 or 105 ■ <i>History 101</i> (Primary program, key program) ■ Math 100 or 101 <p>MA History (Graduate)</p> <ul style="list-style-type: none"> ■ European History ■ <i>United States History</i> (Primary program) ■ Asian History <p>Ph.D. in History (Doctoral)</p> <ul style="list-style-type: none"> ■ European History Asian History ■ <i>United States History</i> (Primary program) ■ Latin American History ■ Middle Eastern History <p>In the above example, the History 101 program is the primary program and also the key program. All fee assessment, credits, and attendance calculation is done based on this program.</p>

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Primary Program	<p>When a student is enrolled in multiple programs within a program type or career, one of the programs must be designated as the primary program.</p> <p>Billing, enrollment validations, and academic statistics are based on a primary program.</p>	NA
Program Attempt Status	<p>A program attempt status is used to determine if a student is currently enrolled in a program, has completed a program, or has discontinued a program.</p> <p>These statuses are not user-defined. They are derived based on a student's enrollment.</p>	<p>Examples of program attempt status include:</p> <ul style="list-style-type: none">▪ Completed: Completed Program Attempt▪ Deleted: Deleted Program Attempt▪ Discontin: Discontinued Program Attempt▪ Enrolled: Enrolled Program Attempt▪ Inactive: Inactive Program Attempt▪ Intermit: Intermitted Program Attempt▪ Lapsed: Lapsed Program Attempt▪ Unconfirm: Unconfirmed Program Attempt

Table G-1 (Cont.) Core Terminology

Term	Description	Example
Program Class Standing	Program class standing measures student progress within a program.	<p>Examples of program class standing include:</p> <ul style="list-style-type: none"> ■ Freshman ■ Sophomore ■ Junior ■ Senior <p>These are user-defined and can be changed as required.</p>
Program Group Types	<p>Programs are classified into groups. These groups are then further classified into program group types based on common administrative needs.</p> <p>Program groups must be mapped to system group types, such as related program group and combined program group.</p>	All business management programs requiring GMAT scores can be grouped under Business Management Program Group.
Program Groups	<p>Programs belonging to a specific career or programs that result in a common award are categorized together into a single program group.</p> <p>Each program group is assigned a program group code and a group type that identifies the purpose of the program group.</p>	The program group Humanities could include the BA programs in History, Literature, Anthropology, and Fine Arts.
Program Offering Option	A program offering option is a set of attributes that defines a course offering. The major attributes are the attendance mode and attendance type. A program offering may have more than one offering option.	<p>The program offering A300 - Bachelor of Arts, version x, Standard Academic Year could be offered from the Falls Creek campus, full-time and on campus. This constitutes a program offering option.</p> <p>In the above example, attendance type is Full-time and attendance mode is On Campus.</p>

Table G-1 (Cont.) Core Terminology

Term	Description	Example
Program Offering Unit Sets	A program offering unit set is a program with associated unit sets attached to an academic calendar.	<p>The program BA History can contain the following unit sets:</p> <p>Unit Set 1 (Summer 2004)</p> <p>History 101</p> <p>History 102</p> <p>History 103</p> <p>Unit Set 2: (Fall 2005)</p> <p>History 301</p> <p>History 302</p> <p>Unit Set 3: (Winter 2006)</p> <p>History 201</p> <p>History 203</p> <p>Each of the unit sets are associated with an academic calendars. Therefore, Unit set 1, Unit set 2, and Unit set 3 are program offering unit sets.</p>
Program Offerings	Program associated with an academic calendar.	If a program is assigned to the standard academic year calendar, then the program is available to the students for the entire academic calendar in that year.
Program Reference Details	Each program in Oracle Student System has a unique program reference code that is used for interacting with external systems.	<p>To define a reference code for a program, you must specify the following program reference details:</p> <ul style="list-style-type: none">■ Name■ Start date - 02/08/2004■ End date - 02/08/2005■ Description

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Program Stage Types	Program stage types are codes used by your institution to indicate the level of progression for a student. Each program stage has a program stage rule. These rules define the criteria for completing each stage.	<p>Given the program stages Foundation, Intermediate and Advanced, map these stages to program types Year 1, Year 2, and Year 3 and associate each program stage with a program stage type and a program stage rule:</p> <ul style="list-style-type: none"> ■ Program Stage: Intermediate ■ Program Type: YEAR 2 ■ Program Rule: Student must complete Foundation
Program Stages	A program is divided into various stages. Students must successfully complete each of these stages to qualify for awards.	A three-year degree usually has three stages: Year 1, Year 2, and Year 3.
Program Status	Program status identifies the program state and indicates whether the program is Active or Inactive.	<p>Examples of program status are:</p> <ul style="list-style-type: none"> ■ Active ■ Inactive ■ Pending ■ Planned
Program Type	Programs can be grouped into program types. Program types are comparable to government program types, but permit more detailed classification and the use of program type names specific to your institution.	<p>The Bachelors program type could include the following programs:</p> <ul style="list-style-type: none"> ■ Bachelor of Computer Science ■ Bachelor of History ■ Bachelor of English

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Program Type Groups	When different program types are classified into a single group, it is called a program type group. Similar programs can be categorized under a common program category.	Examples of program categories include: <ul style="list-style-type: none"> ■ Undergraduate ■ Non-Award ■ Corporate
Program Version Rules	Program version rules specify the criteria for completing a program.	The Bachelor of Arts in Social Science program can have a program version rule specifying that the student must complete the program stage type Foundation prior to enrollment in the program stage type Final.
Program Versions	A program version number distinguishes identical programs. Program versions differ from each other in terms of attributes, such as the start and end dates and attendance modes.	You can have one version of a BA History (version 1) program that permits an intermission during an academic year, whereas another version of the same program BA History (version 2) might not permit intermission during the course of the program.
Program	A program is a systematic plan of study and can consist of multiple units.	The units European History and Early American History can be grouped together in the program BA History.
Program-centric approach	In the program-centric approach, all programs enrolled in are included for fee assessment. A single program is designated as the key program and is used to calculate the attendance type and the credit points earned.	NA
Programs for Financial Aid	You can specify which programs are eligible for state, federal, or institution aid.	NA

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Reference Code Types	<p>A reference code type is a grouping of reference codes based on the purpose of the code.</p> <p>You can create your own reference code types and assign them to system reference code types.</p>	You can define a reference code type of Phone and assign this reference code type to all the units that can be accessed through the IVR system.
Reference Codes	<p>Reference codes are user-defined unique identifiers used by external systems, such as Voice Response (IVR), to identify programs and units.</p> <p>Reference codes are different from the system program as reference codes are used only by the external systems to identify a program or a unit. System unit codes are used by fee administrators to locate programs and units in the system.</p>	NA
Secondary Programs	Active programs within the same career with a lower priority than the primary program are called secondary programs.	<p>A student graduating in History can also enroll in other programs, such as Sociology, Music, and Anthropology.</p> <p>In this case, History will be the primary program of the student and the other programs will be secondary programs.</p>
Special Requirements	You can set up codes identifying special requirements. These are used to indicate external courses the student has completed towards the fulfillment of a program attempt.	To complete a nursing program, a student can be required to complete external courses, such as First Aid and CPR.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Teaching Overrides	When creating a unit, you specify the numbers of teaching hours for an instructor. You can modify the teaching hours at the unit section level, if required at a later point of time. This activity is termed as teaching override.	NA
Unit	A unit is a standalone module of study associated with a unit set within a program.	Program: BA History Unit Set: History Major Core Requirements Units: HIST210GS, Western Civilization HIST250GS, American History
Unit Category	Unit categories are used to classify and group unit versions with similar characteristics. Unit categories can be used to determine student academic progression in each academic year.	If computer science students are required to attend a unit providing basic computer literacy, then you can create unit category CL to group all units that are part of the basic computer program. A student is promoted to the next academic level only if the student attends the units categorized in the CL unit category.
Unit Class	A unit class describes the time and mode of class availability. Unit classes are assigned to unit offering options.	A unit class EON can be used to define classes offered on campus in the evening. E describes Evening class and ON describes On campus mode.
Unit Curriculum	The units included as part of a curriculum are called curriculum units. These units are marked with a curriculum ID, unit code, version number, and title.	NA
Unit Internal Program Type Levels	A unit internal program type level specifies the program type to which a unit is attached.	Unit European History 301 can be linked to the program type MA History.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Unit Level	Unit levels are used to specify the year in which units are attempted for a particular program type. Unit versions may have different unit levels, depending on the associated program type. A unit level corresponds to the year level of the programs to which the unit belongs.	<p>Level 1 can refer to a unit in the first year of an undergraduate degree course.</p> <p>Level 5 can refer to a unit in the first year of a Masters Degree.</p> <p>This does not preclude students taking a level 2 unit in the third year of a course.</p>
Unit Mode	A unit mode describes how the class is presented. Every user-defined unit mode must be mapped to a system unit mode.	<p>The system unit modes are:</p> <ul style="list-style-type: none"> ■ On campus ■ Off campus ■ Composite (combination of both on campus and off campus)
Unit Offering Pattern Notes	<p>Additional information in note format associated with unit offering patterns. Notes may be created, stored, and retrieved in the following formats:</p> <ul style="list-style-type: none"> ■ Microsoft Word ■ Microsoft Excel ■ Text ■ Other Linking and Embedding (OLE) applications 	NA

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Unit Program Type Level	<p>To be activated, a unit must be attached to a program type level. You attach a unit to a program type level to determine the role of the unit in that program and determine if the unit is to be included:</p> <ul style="list-style-type: none">■ For GPA calculation for the program■ For calculating the academic statistics for each program■ In transcripts	NA
Unit Repeat Families	Unit repeat families consist of units that are required to be repeated if the student fails to complete a course. A course or line of study is referred to as a repeat family.	Students who fail Biology must reappear for all the units within Biology, such as Genetic Concepts, Introduction to Microbiology.
Unit Section	A unit defined in terms of attributes, such as academic calendar, location, attendance type, and attendance mode is a unit section.	NA
Unit Section Details	Details required to define a unit section are called unit section details. They are same as the attributes of a unit.	NA

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Unit Set	<p>A unit set is a logical grouping of units. To complete a program, students must attempt a certain number of unit sets associated with the program.</p> <p>Unit sets can be academic and administrative. Academic unit sets define the path of a study a student has selected. Examples include a Major in Accounting or a Specialization in Taxation.</p> <p>Administrative unit sets can be used to restrict the set of pathways a student can follow within a program.</p>	<p>To complete the Bachelor of Business M40, a student can either take Unit Set 1 or Unit Set 2. Unit set 1 consists of the following Majors units, which constitute one pathway:</p> <ul style="list-style-type: none"> ■ Accounting ■ Banking and Finance and Economics <p>Unit Set 2 consists of the following Majors units, which constitute the second pathway:</p> <ul style="list-style-type: none"> ■ Management ■ Marketing ■ Communications <p>If unit sets are marked as administrative unit sets, then a student applying for unit set 1 is prevented from taking any major unit from unit set 2.</p>
Unit Set Categories	Unit sets can be categorized as Major, Minor, Core, or Specialization.	NA
Unit Set Rules	Unit set rules define the requirements to attempt the unit set.	Before students can nominate the unit set, they must have or be granted advance standing equal to or greater than the number of credit points specified.
Unit Set Status	A unit set status defines the state of activity of a unit version. Each unit status defined must be mapped to a system unit status.	If you use the term Current to identify a unit status, this can be mapped to the system status Active.

Table G–1 (Cont.) Core Terminology

Term	Description	Example
Unit Status	A unit status defines the state of activity of a unit version. Each user-defined unit status must be mapped to a system unit status.	Map the user-defined statuses to the system statuses as follows: <ul style="list-style-type: none">■ Current - In Progress■ Inactive - Not Available■ Planned - Future
Unit Subtitle	A unit subtitle can be any secondary title. Subtitles are modified in the case of repeatable units.	A student enrolls in a unit titled Independent Study. Because the student's focus is the French Revolution, the unit's subtitle becomes French Revolution. The following year, the same student enrolls in the Independent Study unit again, but this time to focus on France during World War II. The unit's subtitle now is WW II France.
Unit Version Rules	The unit version rules are used to determine conditions that must be met prior to enrollment in a unit. Unit version rules apply to the unit code and version number.	NA

Glossary

1040 form/1040A form/1040EZ form

Federal income tax returns. Each person who received an income during the previous year must file a 1040 form with the IRS by April 15.

1090 form

Used by businesses to report income paid to a non-employee. Banks use this form to report interest income.

401(k)

Type of retirement fund. Money can be borrowed from a 401(k) to help pay for a child's education.

academic calendar

Twelve-month user-defined period representing a cycle of academic activities.

academic calendar instance

An academic calendar becomes an instance when actual start and end dates are given.

academic record

The complete historical record of a student's academic course work.

academic year

An academic year consists of at least 30 weeks of instructional time.

accrual date

Date on which the interest on an educational loan begins to accrue. See *subsidized loan*.

academic history

Record of prospect or applicant's secondary and post-secondary units and grades at a previous educational institution.

academic index

Value calculated for a student based on academic history, previous academic performance, and admission test scores.

academic interest

Applicant's subjects of interest; potential majors.

Account Code

General ledger account code specific to a financial reporting period.

ACT

See *American College Testing Program*.

Action Date - tracking Subsystem

Date calculated by the system, or entered by the user, when a tracking step should be completed. Initially it is calculated using the Tracking Item Start Date, Business Days Only indicator, and the number of action days for the tracking type step. For sequential steps, the completion date of the previous step is taken into account.

action date - unit assessment item

Inserted automatically when a change is made to a student unit assessment item, indicating that a change must be applied to related student unit attempts. Deleted after the change is applied to student unit attempts.

Action Date - Unit Assessment Pattern

Inserted automatically when a change is made to a student unit assessment pattern, indicating that a change needs to be applied to related student unit attempts. Deleted after the change is automatically applied.

Action Days

Maximum number of days to complete a tracking step for tracking items. Used with sequential and business-days only indicators to calculate the action date of the step.

achievement tests

Tests measuring a student's proficiency and accumulated knowledge of specific subject areas. Different schools require different achievement tests as part of their admissions requirements. Since March 1994, these tests are known as the SAT II tests. See *educational testing service* and *scholastic assessment test*.

advising

A service provided by a faculty member or designated advisor. Advisors offer guidance of various kinds to students during their academic careers.

adjusted available income

Remaining income in the federal methodology after tax and basic living allowances are subtracted.

address usage

The location or purpose, for which the address has been defined, such as, BILL TO and HOME.

admit/deny

A practice that admits marginal students, but does not award them any financial aid.

Administrative indicator

Indicates whether the unit set is Administrative or Academic. Administrative unit sets typically do not appear on official documents such as transcripts.

Administrative Unit Status

Institution-defined administrative statuses applicable to a discontinued student unit attempt, such as Withdrawn Early and Withdrawn Late - Fail. Used to determine load, progression, and grades.

admission calendar

User-defined nine or twelve month period of admission activities prior to enrollment.

admission categories

Institution-defined categories for applicant groups whose applications are processed using a common set of admission steps.

admission code

Indicates the various types of admissions that can occur. Examples include Conditional, Transfer, and Returning.

admission conditional offer status

Indicates status of an admission for which the admission offer is conditional on satisfying certain requirements. Examples include Conditional Offer Outstanding, No Conditions Attached to Offer and Conditions Pertaining to Offer Waived.

american college testing program

One of two national standardized college entrance examinations used in the United States. Most universities require either the ACT or SAT as part of an admission application. See *scholastic assessment test*.

Admission Documentation Status

Describes the status of the documentation required of an applicant by the institution.

Admission Entry Qualification Status

Qualifications that indicate applicant eligibility to apply for a program.

admission fee status

Indicates if the applicant has paid the admission fee or not.

alternative loans

Education loans offered by private lenders. These loans supplement the student and parent education loan programs available from federal and state governments. See *private loans*.

admission offer deferment status

Describes the progress of the applicant's request for deferral of admission. Examples include Approved, Rejected, or Withdrawn.

admission offer response status

Describes the status of the applicant's response to an admission offer. Examples include Accepted, Deferred, and Rejected.

admission outcome status

Describes the progress of the applicant's request for admission to a program. Examples include Offer, Rejected, Application Suspended, and No-Quota.

advanced placement test

Test to earn college credit for subjects studied in high school. Offered by the Education Testing Service in the spring. AP tests are scored on a scale from 1 to 5 where 5 is the highest possible score. See *educational testing service*.

admission process category

A category created by assigning a system admission-process type to an admission category. Admission process categories describe broad categories such as undergraduate, graduate, and professional.

admission process step

A system-defined action, set as a guideline or mandatory requirement for application processing.

admission tests

See *admission test type*.

admission test segment

Sections of an admission test. For example, the test type Test of English as a Foreign Language has the sections, Listening and Reading Comprehension, Grammar, and Writing.

admission test results

Scores attained on an applicant's standardized admission test.

admission test type

Admission tests that may be required for admission. Examples include Scholastic Aptitude Tests, Test of English as a Foreign Language, Graduate Management Admission Test, and Graduate Record Examination.

admission type

See *basis for admission type*.

admission unit outcome status

Describes the applicant's progress for admission to a unit. Examples include Pending, Offered, and Rejected.

admissions officer

Individual who administers the admissions process.

advanced standing

Recognition of a student's expertise, experience, or previous studies as fulfilling some segment of the academic requirements of the current program attempt.

advanced standing internal limit

Maximum amount of advanced standing that can be granted in a specific program.

advanced standing qualification recency

Time period, in years, that other studies are recognized for the purpose of granting advanced standing in a program.

advanced standing type

System-defined types describing the effect of granting an application for advanced standing, such as unit credit, partial credit, unit level and unit preclusion.

advanced standing unit

Unit for which advanced standing is granted. For example, students who studied music in secondary school might be precluded from the Introduction to Music unit because the class is equivalent to their prior music studies.

advanced standing unit level

Level at which advanced standing is granted.

advisor

A faculty member or designated person who guides students through academic questions, problems, and/or course work to plan and complete a degree program.

alias

See *person alias*.

allocation method

Methods for determining the number of elements used in a disbursement calculation; include STUDENT, PERCOURSE, PERUNIT, EFTSU, and CRPOINT.

allowable materials - examination

Materials that students are allowed to take into an examination.

allow intermission

Indicates if intermission is allowed for the program version.

alternate application ID

User-defined application identifier.

alternate code for calendar instance

Alternate short reference code for identifying a teaching or academic calendar instance, used for entering enrollments and unit and program offerings.

alternate code - program offering

Code identifying the program offering in order to simplify data entry.

alternate ID

See alternate person identifier.

alternate person

See alternate person identifier.

alternate person identifier

Code by which a person is recognized by other systems and organizations. Examples include government numbers, staff numbers, student identification numbers issued by other organizations, and employee numbers.

alternative exit

Allows students whose achievement satisfies the requirements of another program version to exit the program in which they are currently enrolled.

amortization

Gradual repayment of a loan over an extended period of time through periodic installments of principal and interest.

annual load value

Standard load in credit points used to calculate effective full time student units for a specified year of the program. Used only when the annual load is not constant during all years of the program.

Anonymity Indicator

Indicates that a panel member has requested anonymity from the research candidate.

AP

See *Advanced Placement test*.

APC

See *admission process category*.

appeal

Formal request for a financial aid administrator to review a student's aid eligibility and possible use of professional judgment to adjust the figures. For example, if a student believes the financial information on the financial aid application does not reflect the family's current ability to pay, for example, because of a parent's death, unemployment, or any unusual circumstances, an appeal must be considered. See *professional judgement*.

applicant

Prospective student who applies for a program.

applicant intent

The reason for applicant applying for the program; it could be a better career, better job prospects, or to enrich skills.

application

Submitted by an applicant for academic and admission calendars and admission process category (APC).

application instances

Group of applications submitted by an applicant for different programs, locations, attendance types, and attendance modes for the same academic and admission calendars, and admission process category.

application completion status

Indicates if the institution has received and verified documentary evidence required to be provided by applicant and finds it satisfactory, unsatisfactory, or incomplete.

application fee

Amount a student is to be charged for every application submitted.

application ID

Generated by the system and unique to an application.

application processing status

Indicates the state of an application process. Examples include Completed, Incomplete or Withdrawn.

application source

Source of an application such as hard copy, electronic, the web or flat files provided by the government or third-party agencies.

application type

Attached to an admission process category and defines different rates for application fees and enrollment deposits. Examples include Graduate and Undergraduate application types.

apply to program indicator

Determines whether certain encumbrance effects apply only to existing student program attempts or apply more broadly.

apportionment percentage

Percentage of the total assessment that the assessment pattern item typically represents.

articulated programs

Programs from which students can continue, with or without credit, directly into a higher program, such as an undergraduate program from which a student can continue directly into a Master's program.

assessable

Indicates whether a unit is subject to fee assessment.

Assess Fees Indicator

Indicates if a program attempt is fee assessable, based on its status. Fee assessable statuses are determined by the system.

assessment ID

See *assessment item ID*.

assessment item

Examination, paper, or other assignment required to complete for a unit.

assessment item assessor

See *assessor*.

assessment item ID

System-generated number that uniquely identifies an assessment item.

Assessment Outcome

Grade or mark for a student unit attempt assessment item. Also known as *assessment result*.

assessment pattern

Grouping of assessment items.

assessment pattern code

Institution-defined code for an assessment pattern.

assessment pattern ID

System-generated number that uniquely identifies an assessment pattern.

assessment program type

Program type to which an assessment item is restricted. If an assessment program type exists, unit assessment items can be assigned only to students whose program type is one of the restricted program types.

assessment result

Grade or mark for a student unit attempt assessment item. Also known as *assessment outcome*.

assessment type

Classification of assessment items, such as examinable or non-examinable.

assessor

Person involved with the assessment of students.

assessor type

Classifies assessors, for example, marker, tutor, and unit-chair.

asset

An item of value, such as real estate, stocks, bonds, mutual funds, cash, or additional property and investments. Asset information is included in student PROFILE data.

assistantship

See graduate assistantship.

associate degree

Degree granted by two-year colleges.

asset protection allowance

A portion of a student's parents' assets that are not included in the calculation of the parent contribution, as calculated by the federal methodology need analysis formula. The asset protection allowance increases with the age of the parents.

Attempt Number - Student Unit Attempt Assessment Item

Assigned to a student unit assessment item to indicate the number of times a student has attempted the assessment item.

Attendance History

Records each change in a candidate's attendance percentage, attendance type, start, and end date.

Attendance Mode

Describes how a student undertakes a program, for example, on-campus or off-campus. Each attendance mode must be mapped to a government attendance mode.

Attendance Percentage

Represents the total attendance of the research candidacy and coursework unit attempts.

Attendance Type

Describes whether a student is classified as full- or part-time, based on the study load.

Authorization Required Indicator

Indicates if authorization is required before a student can select a unit set as part of the chosen program.

Authorized By

Person who authorizes a unit set to be included in a student's record, if authorization is required, or who authorized a unit set to be removed from a student's record if the unit set is specified as part of an offer of admission.

availability (Available Date)

Used in context of inquiry package items giving availability of items. For package items, the estimated date when a package item is available. The Available Date field has no functionality attached and must be manually maintained.

award

A degree, diploma, certificate or other similar formal sign of recognition for successful program completion.

award code

Identifies an award, such as Bachelor of Arts or Graduate Diploma of Education, offered by an institution.

awarding ISIR

The ISIR record that the educational institution uses to process student aid is known as an Awarding ISIR and may differ from the Payment ISIR. See *ISIR* and *payment ISIR*.

award program

Program that yields an award when completed successfully.

award letter

A document issued by an institution's financial aid office listing the aid awarded to the student. Students are required to sign and return a copy of the letter, accepting or declining each source of aid. The award letter is also known as Financial Aid Notification (FAN).

Award Program Only Indicator

Specifies whether a unit is available only to award program students.

award year

Academic year for which the financial aid is requested or received. Financial aid is processed based on award years, which are usually 18 to 20 months long. In most cases, award years overlap because a new cycle starts every calendar year. See *processing year*.

bachelor's degree

Undergraduate degree granted by four-year colleges and universities.

balloon payment

A larger than usual payment used to repay the outstanding balance of a loan without penalty. Not all loans allow balloon payments. Simple interest loans such as educational loans, generally allow balloon payments.

bankruptcy

A bankrupt person is declared legally insolvent and all property is distributed among creditors or otherwise administered to satisfy the interests of creditors. Federal student loans, however, cannot typically be discharged through bankruptcy.

Base Balance

Amount upon which a percentage disbursement formula is based, including GROSS, total income disbursed for a fee type or calendar instance, NET, income available after disbursement by the last fixed formula, and REMAINDER, income remaining after all previous formulas are applied.

basis details

Details upon which an approved advanced standing is based.

Basis for Admission Type

Identifies the main criteria used in granting an applicant admission to a program. Examples include bachelor's degree, membership in academic honor societies, and work experience.

base year

Tax year prior to the academic or award year for the year that the financial aid is requested. The base year runs from January 1 of the junior year in high school through December 31 of the senior year. Financial information from the base year determines eligibility for financial aid.

Booking Cost

Cost of hiring a venue.

budget

See *cost of attendance*.

Business Days Only Indicator

Specifies that calculation of the Completion Required By date of a tracking item and the action dates of a tracking step account only for business days.

bursars office

University office responsible for billing and collection of university charges. Also known as *Student Accounts Office*.

By-Pass Indicator

Determines if an item's tracking step is bypassed. If a tracking step is bypassed, action dates of subsequent steps are recalculated.

CWS

See *College Work Study*.

Calculation Data

Charge rates, charge elements, charge methods, rules, and load apportionment used in calculating fees.

calendar category

System-defined categorization of calendar types. Each calendar type must be assigned a calendar category for Oracle Student System to determine the

functionality of each calendar type. Examples include Academic, Admission, and Assessments calendar categories.

Calendar Configuration

System-defined date aliases are mapped to institution-defined date aliases. This mapping is used in the Admissions, Enrollments and Research subsystems to enforce deadlines.

Calendar Instance

Institution-defined data that defines specific occurrences of a calendar type. Assigning a start and end date and a calendar status to a calendar type creates a calendar instance.

Calendar Instance Relationship

Indicates whether a calendar instance is subordinate or superior in relation to another calendar instance. A calendar instance can have several superior and subordinate calendar instances.

Calendar Status

Institution-defined status indicating calendar's level of activity. Each calendar status must be assigned a system status, including Active, Inactive, or Planned.

Calendar Type

Represents a time span in the academic or administrative calendar. Each calendar type is assigned a calendar category for functionality within the Oracle Student System. For example, a calendar type for the calendar category Teaching can be SEM1 for semester one and SEM2 for semester 2.

Calendar Type Abbreviation

Short description of a calendar type used within the institution. Examples include ACAD YEAR for standard academic year, SEMESTER 1 for semester 1 teaching period, TRIMESTER 2 for trimester 2 teaching period, and ENROLLMENT 1 for enrollment period 1.

campus-based aid

Financial aid programs administered by the university. The Federal Government provides the university with a fixed annual allocation that is awarded by the financial aid administrator to deserving students. Such programs include the Perkins Loan, Supplemental Education Opportunity Grant, and Federal Work Study.

capital gain

Increase in the value of an asset such as stocks, bonds, mutual funds, and real estate between the time the asset was purchased and sold.

career

Grouping of the program for a student (e.g., undergraduate, graduate, etc.)

Credential Types

User-defined designations for documents, such as letters of recommendation, that an applicant provides in support of an application.

cancellation

Loan programs can allow cancellation of a loan under special circumstances. Some federal student loan programs have additional cancellation provisions. For example, if students serve as public school teachers in specified national shortage areas, they can be eligible for cancellation of all or part of their loan amount. Repayment assistance is available if the borrower serves in the military.

capitalization

Addition of unpaid interest charges to the principal balance of an educational loan, thereby increasing the size of the loan. Interest is charged on the new balance, including both the unpaid principal and the accrued interest. Capitalizing the interest increases the monthly payment and the amount of money that must be repaid. Capitalization is also known as *compounding*. See *unsubsidized loan*.

Central Processing System

The U.S. Department of Education's processing facility for application data.

ceremony closing date alias

Last date when graduands can be automatically allocated to the ceremony.

ceremony round

Period of time when a set of graduation ceremonies is conducted and includes, the pre- and post-ceremony activities.

ceremony round end date alias

End date of the period when possible graduands are automatically identified and created for the ceremony round.

ceremony round start date alias

Start date of the period when possible graduands are automatically identified and created for the ceremony round.

Charge Element

Component of a fee calculation in which a rate per element is multiplied by the number of elements representing a student's study load over a fee period.

Charge Method

Determines the number of charge elements used in fee calculation.

Charge Method Apportion

Relationship between fee periods and load periods that determines a student's study units and study load in effective full time student units, credit points, or number of units for the fee period.

Charge Rate

Rate per element that applies to a fee.

Child Organizational Unit

Subordinate organizational unit.

Citation

Text field for citation information to be read during a graduation ceremony.

Citizenship 1

Country of primary citizenship.

Citizenship 2

Country of secondary citizenship in the event of dual citizenship.

Citizenship Code

Institution-defined code describing a person's citizenship and residency status that must be mapped to a government citizenship code.

Classification Code

Links organizational unit accounts with formulas to disburse fee income.

class schedule

The list of courses and sections offered in a given semester, including days, hours, places of meeting and names of instructors.

class standing

Student's year of study, for example, freshman, sophomore, junior, and senior.

collateral

Property used to secure a loan. If the borrower defaults on the loan, the lender can seize the collateral. For example, a mortgage is usually secured by the house purchased with the loan.

Collect Mark Indicator

Specifies if marks can be recorded when entering results.

collection agency

A company often hired by the lender or guarantee agency to recover defaulted loans.

college board

A nonprofit educational association of colleges, universities, educational systems, and any educational institutions.

college scholarship service

An arm of the College Board and one of the agencies that processes financial aid information and applications.

college work study

College work study is a part-time job.

common application form

A general application form that is accepted by multiple educational institutions.

Combined Degrees

Programs leading to more than one award, such as a B.A./B.S degree leading to both Bachelor of Arts and Bachelor of Science awards.

Commencement Date

Date a student begins the current program attempt or a research candidate begins research. The default date can be overridden.

Commencing Student

See *new student*.

Completed Checkbox - Basis Details

Indicates if a student completed the program forming the basis of the unit advanced standing.

Completion Date of Tracking Item

Date set automatically by the system when the last tracking step is completed.

Completion Date of Tracking Step

Date when action for a tracking step is completed.

completion period

Year and time, such as end of year, midyear, or summer, when a student is likely to complete a program's requirements. A ceremony round is associated with one or more completion periods. The graduand identification and creation process selects the student program attempts whose completion period matches one of those associated with the ceremony round.

Completion/Progression Indicator

Indicates if advanced standing details count toward a student's completion and progression requirements for a program.

Completion Required By

System date derived from the target days set for each tracking type, taking into account the Business Days Only indicator, which can be overwritten if necessary.

compounded interest

Interest paid on the principal balance of a loan and on any accrued interest. Capitalizing the interest on an unsubsidized Stafford loan is a form of compounding. See *capitalization and Stafford loans*.

conditional Offer

Offer of admission to a program that depends on an applicant fulfilling specified requirements such as submitting original transcripts.

conferral date

Date an award is officially given, applied by the system to a group of graduands or manually to an individual graduand.

confirmed Date

Date when a thesis panel member accepts an invitation to become a member of the thesis examining panel.

confirmed indicator

Confirms a student's enrollment in a program.

confirmed offering indicator

Indicates if the offering detail has been checked and confirmed after being rolled over from a previous calendar version, and selected by default or manually.

constraints - examination

Hindrances to scheduling an examination.

consolidation loan

Combines several outstanding student loans into one loan from a single lender. Used to help students repay all loans with a single monthly payment.

contact hours

Minimum number of contact hours, or in-class time for a unit, required by a student for completing a program.

contact indicator

Indicates if a student wishes to be contacted about the university's disability services.

continuing education units

Also known as CEUs. Designates credit point values associated with a unit or unit section that do not grant regular academic credit.

continuing student

See *Returning Student*.

contract rate

Fee rate negotiated with the institution for a student.

contribution option mapping

Maps contribution payment options to admission categories.

contribution payment option

Describes the possible contribution payment options, for example, Deferred, Upfront, and Exempt.

Convocation Members

Alumni of an institution.

cooperative education

Program where the student spends time engaged in employment related to their major in addition to regular classroom study.

coordinator - venue

Person who coordinates a venue.

corequisite

A course that must be taken at the same time as another course.

cost of attendance

Cost of attendance (COA) is the amount required to cover all education expenses. Student COA is determined by the institution.

count in progression indicator

Indicates if the advanced standing details count toward a student's completion and progression requirements for the program.

country code

Institution-defined code describing a country that must be mapped to a government country code.

credit rating

An evaluation of the likelihood of a borrower to default on a loan. Credit bureaus and credit reporting agencies provide this information to banks and businesses to help them decide whether to issue a loan or extend credit. A credit rating can include a borrower's payment history, a list of current and past credit accounts with balances, employment and personal information, and a history of past credit problems.

creation date

System-generated date indicating when a record is created or date when an assessment item is attached to a student unit attempt.

creation method - grade

Describes how an assessment outcome is loaded, for example, Keying and Upload.

credit point descriptor

Institution-defined name for credit points.

credit points achievable

Number of credit points awarded on successful completion of a unit.

credit points required

Minimum number of credit points required to complete program requirements.

credits total EFTSU

Total Equivalent Full Time Student Unit (EFTSU) for a program. This term represents the student load for a unit or part of a unit expressed as a proportion of the workload for a standard annual program for students undertaking a full year of study in a particular year of a particular program.

currency code

Indicates the currency in which fee assessments and payments are made.

current ID

Person number of the record chosen to be the current record in the Merge Person ID process.

custodial parent

If a student's parents are divorced or separated, the custodial parent is the one with whom the student lived the most during the past 12 months. The student's need analysis is based on financial information supplied by the custodial parent.

date alias

Institution-defined name of an event, not an actual date. Each date alias must be assigned a date alias category and can be assigned a calendar category. For example, END-LECT represents the last day of lectures in a teaching period.

date alias abbreviation

Short description of a date alias event. Examples include CENSUS DATE for census date, END LECTURES for last day of lectures in teaching period, and WD CUTOFF DATE for last day to withdraw from unit without failing.

date alias category

Institution-defined classification of date aliases according to common attributes for inquiry or reporting purposes. Each date alias must be assigned a date alias category. Examples of date alias categories include fee dates, unit withdrawal dates, and teaching dates.

date alias instance

Individual occurrence of an event created by assigning a date alias to the appropriate calendar instance, and assigning an alias value. For example, to create a date alias instance for the start of an examination period, the user can assign the date alias EXAM-ST to the appropriate calendar instance, and then assign an alias value, 05-JUN-1997.

date alias instance absolute value

Real date allocated to a date alias instance. Examples include 01-JAN-2000 and 15-NOV-1999.

date alias instance offset

Number of days, weeks, months, and years between two date alias instances, used to calculate the alias value for a date alias instance.

date alias offset

See *Offset Date Alias*.

date alias pair

See *Paired Date Aliases*.

date notified - special consideration application

Date inserted by the system when a special consideration application outcome notification letter was created.

declined date

Date when a proposed panel member declined to sit on a thesis examining panel.

degree

An academic title the university is authorized to confer as official recognition to those who complete an academic program. An example is a Bachelor of Science Degree.

default/defaulters

A borrower's failure to repay the loan according to the terms agreed upon when the promissory note was signed. Default can also occur if a borrower fails to submit requests for loan deferment or cancellation. When a borrower defaults on a federal student loan, the institution, organization holding the loan, guarantee agency, and federal government can all take action to recover the money. A borrower is considered to be in default when payments are 180 or more days overdue and no arrangements for deferment or forbearance are made. Assets, including Internal Revenue Service (IRS) refunds can be seized and the borrower's credit record or history is negatively affected. Student loan borrowers who are in default are ineligible for additional federal student aid, including grants and loans.

default basis institution

Institution used as the default exemption institution when creating unit or unit level advanced standing records.

default - funding source

Indicates that a funding source is the default for students enrolled in a program. Only one funding source can be the default for a program.

default indicator - assessment item

Indicates that an assessment item is the default item for a unit.

default indicator - assessor type

Indicates that an assessor type is the default type assigned to an assessor record, automatically created by the system when a unit assessment item is created.

default item

Assessment item automatically assigned to students enrolled in a unit.

default major exemption institution

Institution used as the default exemption institution when creating advanced standing records.

default outstanding grade indicator

Indicates that a grade is the default grade used to replace blank grades by the Insert Administrative Grades process.

default pattern indicator - assessment pattern

Indicates that an assessment pattern is the default pattern for a unit. Default patterns are automatically assigned to students enrolled in a unit.

default period

Operating period for a disbursement formula, derived from the start and end date alias instances of an associated fee period, that becomes the default. See *override period*.

deferment

Occurs when a borrower is allowed to postpone repaying the loan. If the borrower has a subsidized loan, the Federal Government pays the interest charges during the deferment period. The borrower is responsible for the interest that accrues during the deferment period on an unsubsidized loan. The interest charges can be postponed by capitalizing the interest that increases the size of the loan. Most federal loan programs enable students to defer their loans while they are in school at least half time. If the borrower does not qualify for a deferment, a forbearance can be possible. A deferment is not possible if the loan is in default.

deferred application

Application accepted for a future academic calendar.

deferment status

See *admission offer deferment status*.

deferred payment option

See *government contribution payment option*.

delinquent

If the borrower fails to make a payment on time, the borrower is considered delinquent and late fees can be charged. If the borrower misses several payments, the loan goes into default.

delivery types

The methods of delivery such as, fax, e-mail or print, used for correspondence with students.

deletion date

System-supplied date indicating when a record was deleted.

deletion date - unit assessment item

Date when an assessment item was deleted from a unit.

deletion date - unit assessment pattern

Date when an assessment pattern was deleted from a unit.

dependant

A child or individual who lives with and is supported by the student. To be considered a dependant, the student must provide for more than half of the individual's expenses. According to the federal methodology, spouses are not dependants. In addition, two people, such as husband and wife, cannot both claim the same child as a dependant. See *independent*.

dependency status

Determines the degree to which a student has access to parental financial resources.

derived value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are derived if the system determines them by examining the student unit attempts for a program. See *nominated value*.

derive grade indicator

Indicates if a grade should be derived from a mark entered by the user, and used to configure the process to enter online results.

destination program attempt

The program to which a student wants to transfer. For example, in a transfer from a Bachelor of Arts in Medieval History to a Bachelor of Arts in Renaissance History, the latter program is the destination program attempt.

differential contribution indicator

Identifies students liable for differential contributions.

direct enrollment

Enrollment in which all processes are initiated in the Enrollment subsystem.

direct loans

The William D. Ford Federal Direct Loan Program, also known as the Direct Loan Program, is a federal program where the school becomes the lending agency and manages the funds directly, with the Federal Government providing the loan funds. See *federal direct student loan program*.

disability type

Institution-defined code describing a student's disability that must be mapped to a government disability type.

disbursement

Release of loan funds to the institution for delivery to the borrower. Loan funds are first credited to the student's institutional account for payment of tuition, fees, room and board, and additional charges. Excess funds are paid to the student in cash or by check.

disbursement category

Grouping of disbursement formulas in order to aggregate disbursed amounts for reporting purposes.

disbursement fixed

Predetermined rate per element where the elements are determined by the allocation method.

disbursement journal

Summarizes fee disbursement information available to an external finance system.

disbursement method

Indicates method of disbursing a student's fee income, whether directly to a specified organizational unit, to organizational units that own a program, or to those organizational units responsible for teaching units in a program.

disbursement percentage

Proportion of a gross, net, or remainder amount available for disbursement and split between a number of elements according to the allocation method.

disbursement snapshot

Summarizes the point-in-time disbursements for a fee type in a fee period at the Fee Type Category Instance level.

disbursement snapshot detail allocations

Summarizes the point-in-time disbursements for a fee type in a fee period at the student, student program, and student unit level.

disbursement snapshot details

Summarizes the point-in-time disbursements for a fee type in a fee period at the organizational unit level.

disclosure statement

Provides the borrower with information about the actual cost of the loan, including the interest rate, origination, insurance, loan fees, and any additional finance charges. Lenders are required to provide the borrower with a disclosure statement before issuing a loan.

discipline group

Field of academic learning into which a unit can be classified.

discontinuation

A student withdraws from a program or unit attempt before it is completed.

discontinuation reason code

Identifies the student's primary reason for the discontinuation of a student program attempt.

discontinuation date

Date a student withdraws from a program or unit attempt.

discontinue enrollment indicator

Alerts staff that it is necessary to discontinue a student's enrollment before authorizing a particular pending fee encumbrance.

discount full payment indicator

Indicates that a discount applies only when payment is made in full for a fee liability.

documentation status

See *admission documentation status*.

dropped unit attempts

Discontinued unit attempts that are not deleted from the database, and are not considered by other subsystems in Oracle Student System for any validations or calculations.

due diligence

If a borrower fails to make payments on the loan according to the terms of the promissory note, the Federal Government requires the lender, holder, or servicer of the loan to make frequent attempts to contact the borrower, through telephone and mail, to encourage repayment of the loan and to make arrangements to resolve the delinquency. See *delinquent*.

due date - unit assessment item

Date when a unit assessment item must be completed and submitted, typically recorded for non-examinable assessment items.

invoice workbench

Used for entering invoices in Oracle Payables.

early action

A program with earlier deadlines and notification dates than the regular admissions process. Students applying to an early action program do not commit to attending the school if admitted, unlike an early decision program. Ivy League schools do not enable applications to more than one Ivy League early action. See *early decision*.

electronic data exchange

Used by participating institutions to electronically receive SARs from the federal processor. At some institutions, Electronic Data Exchange (EDE) enables students to

electronically file the Free Application for Federal Student Aid (FAFSA). See *SAR* and *FAFSA*.

early admission

Program enabling gifted high school juniors to skip their senior year and enroll in college. The term Early Admission is sometimes used to refer collectively to early action and early decision programs. See *early action* and *early decision*.

early decision

Program with earlier deadlines and notification dates than the regular admissions process. Students who apply to an early decision program commit to attending the school if admitted. Early decision can be applied to only one school.

early exit

Allows an originator to sign off on an item before all steps are complete.

EDE

See *electronic data exchange*.

EFC

See *expected family contribution*.

effective end date alias

Date alias linked to the system effective end date of a research teaching calendar.

effective full time days total

Calculated value indicating the total number of effective full-time days a candidate has to complete research.

effective full time days used

Calculated value indicating the number of effective full-time days used as of the current date.

effective full time student units

Represents the student load for a unit or part of a unit, expressed as a proportion of the workload for a standard full-year program.

effective start date alias

Date alias linked to the system effective start date of a research teaching calendar.

eligible to enroll record

Record created during pre-enrollment for returning students.

enrolled credit points

Total credit points in which a student is enrolled.

enrolled date

Date on which a student enrolls in a unit.

enrollment category

Specifies steps for the enrollment procedure. Students with common enrollment characteristics have the same enrollment category.

enrollment due date

Due date by which a student program attempt has to be enrolled. This date defaults to the due date for enrollment specified during setup.

enrollment method

Defines method used by a student to enroll to program or unit attempts, such as face-to-face or self-service

enrollment session

Combination of academic calendar, enrollment category, and enrollment method. An example would be an academic calendar of AY04, a standard enrollment category, and the self-service enrollment method.

enrollment validations

Checks that enforce rules for enrollment specified during setup.

enrollment period

Period during which enrollment is attempted.

expected family contribution

Sum of money that the family is expected to be able to contribute to the student's education, as determined by the federal methodology need analysis formula approved by Congress. Includes the parent and student contributions and depends on the student's dependency status, family size, number of family members in school, taxable and nontaxable income, and assets. The difference between the cost of attendance and the expected family contribution is the student's financial need

and is used in determining the student's eligibility for need-based financial aid. If a student has unusual financial circumstances such as high medical expenses, loss of employment, or death of a parent that can affect the ability to pay for an education, the financial aid administrator (FAA) can adjust the cost of attendance or expected family contribution to compensate. See *professional judgement*.

ETS

See *educational testing service*.

educational testing service

Company that produces and administers the SAT and additional educational achievement tests. See *scholastic assessment test*.

effect type

See *system hold effect type*.

effective date

If specified as a parameter in a process, allows the process to access the database on a date other than the current date.

effective date - currency

Date when a currency's rate of exchange applies.

effective end date alias

Date alias linked to the system effective end date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective full time days total

Calculated value indicating the total number of effective full-time days a candidate has to complete research.

effective full time days used

Calculated value indicating the number of effective full-time days used as of the current date.

effective full time student units

Represents the student load for a unit or part of a unit, expressed as a proportion of the workload for a standard full-year program.

effective start date alias

Date alias linked to the system effective start date of a research teaching calendar. The effective full time days for a research teaching period is determined by the number of days between the effective start and end date aliases.

effective time elapsed for progression indicator

Indicates if unit attempts with a particular administrative unit status are considered to be enrolled for progression time elapsed calculations.

effectively enrolled for progression indicator

Specifies that unit attempts with a particular administrative unit status are considered to be enrolled for progression rule checks.

EFT

See *expected family contribution*.

electronic outcome upload file

Comma-delimited text file of student unit attempt outcomes uploaded into the system.

electronic funds transfer

Used by some institutions and lenders to wire funds for Stafford and PLUS loans directly to participating institutions without requiring an intermediate check for the student to endorse. Money is transferred electronically and is available to the student sooner.

element

See *charge element*.

element range

Range of study loads against which a rate is recorded. See *charge element*, *charge method*, and *charge rate*.

element range rate

Rate attached to an element range.

eligible noncitizen

Person who is not a U.S. citizen but is eligible for federal student aid. Eligible noncitizens include U.S. permanent residents who are holders of valid green cards,

U.S. nationals, holders of form I-94 who have been granted refugee or asylum status, and certain noncitizens. Noncitizens who hold a student visa or an exchange visitor visa are not eligible for federal student aid.

embargo details

Text field to record the details of an embargo placed on the release of a thesis.

embargo expiry date

Date when an embargo placed on the release of a thesis expires.

emancipated

To release a child from the control of a parent or guardian. Declaring a child to be legally emancipated is not sufficient to release the parents or legal guardians from the responsibility of providing for the child's education. See *dependency status*.

end date alias - fee assessment processing

Last date when an effective date for fee assessment processing can be set.

end date of calendar instance

Date when a calendar instance is no longer effective.

end date - fee period

Last date of a fee period.

end date - grading schema

Last date of a grading schema version.

end date - institution address, location address, organizational address

Date when an address for an institution, location, or organizational unit is no longer effective.

end date - organizational unit

Date when an organizational unit is no longer effective.

end date - program offering instance

Date when a program offering instance is no longer effective.

end date - program version

Date when a program version is closed and all students have completed the program or transferred to other versions, and no additional students can enroll in the version.

end date - unit sets

Date when a unit set version is closed and all student unit sets are complete or ended.

end date - unit version

Date when a unit version is closed and no students can be enrolled.

end time - exam session

Time an examination session concludes.

end time - unit class

Time a unit class concludes.

enrollable indicator

Specifies that the program offering pattern is available for student enrollment.

enrolled credit points

Number of credit points in which a student is enrolled.

enrolled date

Date a unit was enrolled.

enrolled indicator

Specifies that a person is currently enrolled in a program at an institution.

Enrollment Category

Institution-defined classification of students who share common enrollment characteristics.

Enrollment Category Mapping

Maps enrollment categories to admission categories.

Enrollment Category Procedure Detail

Grouping of enrollment procedure steps created by assigning an enrollment method type and a student commencement type to an enrollment category.

Enrollment Category Procedure Step

Step recorded for a particular enrollment category procedure.

Enrollment Method

See *Enrollment Method Type*.

Enrollment Method Type

How a student enrolls, whether face to face or by phone.

Enrollment Quota

Restricts the number of students that can be enrolled in a particular unit offering.

enrollment status

Indicates if a student is full-time or part-time. Generally, a student must be enrolled at least half-time, and in some cases full-time, to qualify for financial aid.

Enrollment Step

A system-defined action required to complete the enrollment process.

entitlement

Entitlement programs award funds to qualified applicants such as the Pell Grant program.

Entry Point Indicator

Indicates if a program offering option can be an entry point through Admissions.

Entry Qualification

See *admission entry qualification status*.

entrance interview

See *loan interviews*.

ELO

See *expanded lending option*.

Estimated Processing Days

Expected number of days to process a special consideration application.

Evaluation Order

Sequence in which disbursement formulas are to be resolved, as determined by formula setup.

evaluators

Individuals assigned to rate applications.

examinable assessment item

Indicates an assessment item that is an examination.

Examinable Indicator

Indicates whether the assessment type is examinable or non-examinable.

Examination Instance Indicator - Supervisor Allocation

Indicates if a supervisor is assigned to a particular assessment item or items during an exam session at a particular venue.

Examination Material Type

Code indicating whether examination material is allowed, not allowed, or supplied at the time of the examination.

examination period

When examinations are held.

examination session venue

See *venue*.

examination session venue supervisor

See *examination supervisor*.

examination supervisor

Person who supervises an examination.

Examination Supervisor - In Charge Indicator

Indicates that an examination supervisor type represents the lead or most significant supervisor for an examination session at a particular venue.

Examination Supervisor Type

Indicates the level of responsibility of a supervisor, and the role the supervisor plays.

Examination Venue Indicator

Indicates if a supervisor is assigned to a particular venue during an exam session.

exit interview

See *loan interviews*.

Exit Program Code

Alternative exit program code.

Exit Version Set

Valid version numbers of an alternative exit program, used by the Progression subsystem.

expanded lending option

Program enabling some schools to offer higher annual and cumulative loan limits to students receiving the Perkins loan. ELO is restricted to schools with a Perkins loan default rate of 15% or less. See *Perkins loan*.

Expected Submission Date

See *submission date - expected*.

expiry date increment

Period of time, in months, added to the current date when creating unit or unit level advanced standing records.

Expiry Date - Program Version

Date when a program version expires. Students already enrolled can remain in an expired program version, but new students are not enrolled unless they receive enough advanced standing to allow them to complete program requirements before the version ends.

Expiry Date - Unit Sets

Date when a unit set version expires, entered in the process of expiring one version and creating a new one. Students can still be enrolled in expired unit set versions until the version is ended. New students cannot select an expired unit set.

Expiry Date - Unit Version

Date when unit version expires. Students already studying this unit version remain enrolled, but no additional enrollments are allowed.

external grade

Grade equivalent to an institution's grading schema grade used when grades are published externally, such as in newspapers.

external limit - advanced standing

Maximum advanced standing granted in a program for studies undertaken outside an institution.

External Reference

File location of a correspondence item copy saved outside Oracle Student System; reference generated outside the Student Finance subsystem.

External Reference Type

Classifies references generated outside the Student Finance subsystem, including Debtor ID, Debit Note, Refund Cheque, and Journal.

FAA

See *financial aid administrator*.

FAF

See *financial aid form*.

FAN

See *award letter*.

FWS

See *federal work study*.

Faculty - Maximum Cross Credit Points

See *maximum cross credit points*.

FCCI

See *Fee Category Calendar Instance*.

FAT

See *financial aid transcript*.

FAO

See *financial aid office*.

FDSLP

See *federal direct student loan program*.

Federal Family Education Loan Program

Includes the subsidized and unsubsidized Federal Stafford Loan, Federal Perkins Loan, and Parent Loan for Undergraduate Students (PLUS). Funds for these loans are provided by private lenders such as banks, credit unions, and savings and loan associations. Loans are guaranteed against default by the Federal Government.

federal direct student loan program

Loans made by the U.S. Government directly to students and their parents through their institutions. The institution is the lending agency that manages the funds provided by the federal government. Includes the subsidized and unsubsidized Federal Direct Stafford Loan and the Federal Direct Parent Loan for Undergraduate Students (PLUS). Also known as the William D. Ford Federal Direct Loan Program. See *federal family education loan program* and *parent loan for undergraduate students*.

federal family education loan program

Includes the subsidized and unsubsidized Federal Stafford Loan, Federal Perkins Loan, and Parent Loan for Undergraduate Students (PLUS). Funds for these loans are provided by private lenders such as banks, credit unions, and savings and loan associations.

federal work study

The federal work study (FWS) is a federal, need-based financial aid program providing undergraduate and graduate students with part-time employment. Although the work study awards are made by colleges, the federal government subsidizes the student salaries. Money earned from FWS is not counted as income for the subsequent year's need analysis process.

Fee Assessment

Process of assessing a student's fee liabilities.

Fee Assessment Effective Date

See *effective date*.

Fee Assessment Period

See *fee period*.

Fee Assessment Rate

Charge rate applying to a fee under a specified set of conditions.

Fee Assessment Routine

Process that assesses whether students are liable for fees or are eligible for adjustment to fees, and that creates assessment or adjustment transactions.

Fee Category

Identifies a distinct fee assessment group of enrolled students liable for a set of fees attached to the fee category. Fee categories are assigned to student program attempts. Examples include INTERNATNL and DOM-CONTRIBUTION, or domestic students liable for a contribution.

Fee Category Calendar Instance

Fee category operating in a specific fee period.

Fee Category Fee Liability

See *fee liability*.

Fee Category Mapping

Maps fee categories to admission categories.

Fee Disbursement Formula

One of a set of formulas that calculates and allocates disbursement amounts from income derived from a student's fee in a specific fee period. See *allocation method*, *disbursement method*, *evaluation order*, *base balance*, *disbursement percentage*, and *disbursement fixed*.

Fee Encumbrance

Encumbrance applied as a result of nonpayment or underpayment of fees.

Fee Encumbrance Status

Describes the status of activity of a fee encumbrance recorded against a student, and maps to a system status.

fellowship

Aid given to graduates to help support their education. Some fellowships include a tuition waiver or a payment to the university in lieu of tuition. Most fellowships include a stipend to cover reasonable living expenses. Fellowships are a form of gift aid and are not repaid.

Fee Liability

Used for a single fee type within a single fee category.

federal methodology

Need analysis formula used to determine the expected family contribution. The federal methodology takes into account family size, number of family members in college, taxable and nontaxable income, and assets.

Fee Period

When a particular fee, fee category, and associated data apply.

Fee Sponsorship Status

Describes the status of activity of the sponsorship of a student program attempt, and maps to a system status.

Fee Sponsor Status

Describes the standing of a particular sponsor in an institution.

Fee Structure Status

Describes the activity of a fee type, category, or liability.

Fee Type

Name of a fee, such as CONTRIBUTION, GSF, and MEDIBANK. A fee type can be assigned as a fee liability of many fee categories.

Fee Type Calendar Instance

Fee type operating in a specific fee period.

federal processor

Organization that processes information submitted on the Free Application for Federal Student Aid (FAFSA) and assesses eligibility for federal student aid.

FFELP

See federal family education loan program.

Field of Study

In the Program Structure and Planning subsystem, a classification of programs in terms of their subject matter. In the Research subsystem, a code representing the field of study is recorded for each candidate. The field of study percentage must total 100% for a candidacy.

financial aid

Financial aid refers to monetary assistance given to students and their families and includes grants, scholarships and self-help aid such as loans and employment.

financial aid administrator

College or university employee involved in the administration of financial aid. Also known as financial aid advisors or counselors.

financial aid form

Previously known as the Financial Aid PROFILE. The Financial Aid PROFILE is a supplementary financial aid form processed by the College Scholarship Service (CSS). A Financial Aid Profile does not require an application for federal student financial aid; the Free Application for Federal Student Aid is sufficient. The Financial Aid PROFILE is used by many private colleges and universities for awarding institutional funds.

financial aid notification

See award letter.

financial aid office

College or university office responsible for determining financial need and awarding financial aid.

financial aid package

Includes grants, scholarships, loans, and work study employment offered to a student to help pay for education. Unsubsidized Stafford loans and PLUS loans are

not considered part of the financial aid package, since these financing options are available to the family to help meet the expected family contribution.

financial aid transcript

Record of all federal aid received by the student at each institution attended. If a student previously attended an institution of higher education and is now applying for financial aid from an additional institution, the latter requires a FAT from each of the institutions previously attended, regardless of whether aid was received or not. This is required by federal law.

Finalized Indicator

Indicates if an outcome for a student unit attempt is finalized.

financial safety school

A school that definitely admits a student and is inexpensive enough to be attended with little or no financial aid.

Final Result

Result of the thesis examination processes. A result code is selected that must map to a system result of type FINAL. See *thesis result code*.

Final Result Indicator

Set for certain system thesis result codes to indicate that they are a final result. See *thesis result code*.

Final Title Indicator

Indicates if the specified title is the final title for the thesis.

Financial Period

Institution's financial year.

first-time borrower

A first-year undergraduate student who has no unpaid loan balances outstanding on the date a promissory note is signed for an educational loan. The first loan payment is disbursed 30 days after the first day of the enrollment period. If the student withdraws during the first 30 days of classes, the loan is canceled.

Fixed Disbursement

See *disbursement fixed*.

forbearance

Lender allows the borrower to temporarily postpone repaying the principal, but the interest charges continue to accrue, even on subsidized loans. The borrower continues paying the interest charges during the forbearance period. Forbearances are granted at the lender's discretion, usually in cases of extreme financial hardship or unusual circumstances when the borrower does not qualify for a deferment. The borrower cannot receive a forbearance if the loan is in default.

Forced Attendance Mode Indicator

Indicates whether a student program attempt attendance mode is forced or restricted. Selecting the check box causes the system to highlight the student program attempt attendance mode if the derived attendance mode conflicts with the forced attendance mode.

Forced Attendance Type Indicator

Indicates whether a student program attempt attendance type is forced or restricted. Selecting the check box causes the system to highlight the student program attempt attendance type if the derived attendance type conflicts with the forced attendance type.

Forced Location Indicator

Indicates whether a student program attempt location, or campus, is forced or restricted. Selecting the check box causes the system to highlight the student program attempt location if the derived location conflicts with the forced location.

Force Processing of Incomplete Package

Overrides any limitation on processing an incomplete package.

funnel status

Indicates whether a person is identified as a prospect, initiated an inquiry, or was contacted by the institution.

Formula Number

Supplied automatically by the system to identify each disbursement formula in a set. See *fee disbursement formula*.

free application for federal student aid

Form used to apply for Pell Grants and all additional federal need-based aid. No fee is charged to file a free application for federal student aid (FAFSA).

Funding Source

Institution-defined source of funds applicable to student program attempts.

gapping

Failing to meet a student's full demonstrated need. See *unmet need*.

Generic Program

Program attribute indicating that students in a program can transfer to any program in the related group at any point during their enrollment. Unlike nongeneric programs in the group, a generic program cannot be a transfer destination.

garnishment

Withholding a portion of a defaulted borrower's wages to repay an outstanding loan without consent.

gift aid

Financial aid, such as grants and scholarships. Students do not need to repay gift aid.

good standing

An advanced standing status which denotes that a student is eligible to continue at or return to an institution.

Government Aboriginal or Torres Strait Islander Code

Indicates if a student identifies as an Australian Aboriginal or Torres Strait Islander.

Government Admission Center

External body that processes applications for admission to government institutions.

Government Admission Code

Describes the matriculation category assigned by the government to an applicant on the basis of current qualifications. These codes can be mapped to user-defined codes. Code recognized by the relevant government admission center to which an institution-defined admission code is mapped.

Government Attendance Mode

Indicates whether a student undertakes a program internally or externally.

Government Attendance Type

Indicates whether a student is classified as part-time or full-time, based on his or her study load.

Government Basis for Admission Type

Government-defined code identifying the basis for granting admission to a program of study.

Government Citizenship Code

Indicates student's citizenship and residency status.

Government Contribution Band

Bands representing different contribution rates applicable to students liable for differential contributions.

Government Contribution Payment Option

Type of government-defined contribution payment option, including deferred, upfront, and exempt.

Government Country Code

Government-defined code describing a country.

Government Disability Type

Government-defined code describing a student's disability.

Government Discipline Group

Government-defined field of study into which a unit is classified.

Government Institution Code

Government-defined code for an institution. Institution codes defined by the institution can be mapped to government institution codes.

Government Language Code

Government-defined code describing the non-English language used at a student's permanent residence.

Government Level of Completion

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's progress toward completion of his or her government education studies, can be mapped.

Government Level of Qualification

Code recognized by the relevant government admission center, to which an institution-defined code, identifying an applicant's current government education qualifications, can be mapped.

Government Permanent Resident Code

Government-defined code indicating a student's permanent residency status.

Government Program Load

Aggregate effective full time student units for a program expressed in tenths. For example, 3.0 is represented as 30.

Government Program Type

Government-defined classification of higher education programs. Each institution-defined program type is mapped to a government program type.

Government Type Of Activity Code

Government-defined code describing research undertaken by a research candidate.

grace days

Number of days added to a payment's due date to defer payments.

grace period

Period after graduation when the borrower is not required to repay student loans.

grade

A number or letter indicating student's level of achievement in a unit attempt.

grade conversion

A feature that converts an applicant grades or grade point averages from one institution to the grading scale in use at the admitting institution.

grade point average value

Numerical value assigned to a grade to calculate a student's grade point average. For example, Grade A can have a grade point average value of 4.

grade rank

Compares a grade to other grades in the same grading schema, used in rules and reports.

grading schema

Describes a set of grades, marks, and results available for the assessment of student unit attempts. You can have multiple grading schemas.

graduate assistantship

Two types of graduate assistantships are available, teaching assistantships and research assistantships. TAs and RAs receive a full or partial tuition waiver and a small living stipend. TAs are required to perform teaching duties. RAs are required to perform research duties, not necessarily related to the student's thesis research. See *teaching assistantship* and *research assistantship*.

graduate student

Student who has earned a baccalaureate degree and is pursuing post-baccalaureate studies.

grade exists

The action taken by the system when a grade already exists in the upload file.

Grade Inclusion Indicators

Designate where unit attempt grades can or cannot be published, for example, Noticeboard and Newspaper.

grade invalid

The action taken by the system when a grade specified in the upload file does not exist in the grading schema used.

grade point average

Measure that averages the grades a student receives, taking into account the total study load.

grant

Type of financial aid based on financial need that is not repaid.

Grade Point Average Value

Numerical value assigned to a grade to calculate a student's grade point average.

graduated repayment

Repayment schedule if the monthly payments gradually increase over the repayment period.

Grade Rank

Compares a grade to other grades in the same grading schema, used in rules and reports.

grading schema

Describes a set of grades, marks, and results available for the assessment of student unit attempts. Multiple grading schemas can exist.

grading schema code

Code identifying the grading schema.

Grad Students Indicator

Indicates if a student can graduate after completing a program. This indicator is not set for non-award programs.

graduand

Student eligible or potentially eligible to graduate in a particular ceremony round, and with a graduand record created.

graduand approval status

Indicates if formal approval to graduate has been received. Associated with a system graduand approval status, including WAITING, APPROVED, and REJECTED.

graduand status

Indicates the current status of a graduand and a graduand's progress toward graduating in a particular ceremony round. Associated with a system graduand status, including POTENTIAL, ELIGIBLE, GRADUATED, and SURRENDER.

graduand type

System-defined values assigned to graduands to define their graduation intentions, including ATTENDING, attending graduation ceremony to receive award; INABSENTIA, not attending ceremony to receive award; ARTICULATE, declining award to pursue a higher program award; DEFERRED, receiving award in a later ceremony round; UNKNOWN; and DECLINED, declining award for other reasons.

graduation cycle

Period of time when all ceremony round activity occurs.

graduation note type

Identifies purpose of a note attached to a graduation ceremony record associated with additional required information. For example, note type GRAD-GUEST is assigned to a ceremony note listing guests attending the ceremony.

granting status

Describes the progress of an application for advanced standing.

gross income

Income before taxes, deductions, and allowances are subtracted.

Group Code

Code identifying a Person Number Group defined by the creator of a Person Number Group.

Group ID

System-generated sequence number identifying a person number group.

Group Membership

See tracking item group membership.

Guaranteed - Entry Assessment Score

Score that guarantees an applicant an offer of admission to a program offering pattern, if it is achieved.

guarantee agency/guarantor

State agencies responsible for approving student loans and insuring them against default. Guarantee agencies also oversee the student loan process and enforce federal and state rules.

guarantee fee

Small percentage of loan paid to the guarantor to insure the loan against default.

guaranteed student loan

Loan insured against default. Federal government agrees to repay the Stafford loans in case of default. Each loan is charged a guarantee fee to cover the costs of defaulted loans.

half-time

Financial aid programs usually require that the student is enrolled at least half time to be eligible for aid. Some programs require full-time enrollment.

health education assistance loan

Low interest loan administered by the U.S. Department of Health and Human Services. Available to medical school students pursuing medicine, osteopathy, dentistry, veterinary medicine, optometry, podiatry, clinical psychology, health administration, and public health. Undergraduate pharmacology students are also eligible.

HECS

An Australian-specific contribution scale used in the fee calculation formula.

HESA

See higher education statistical agency.

higher education statistical agency

Organization that collects information from publicly funded institutions of higher education in the United Kingdom and uses the information to compile a wide range of statistics for statutory customers.

HSS

See U.S. Department of Health and Human Services.

health professions student loan

Low interest-rate loans administered by the U.S. Department of Health and Human Services (HHS). These loans are available to students pursuing degrees in specific health related fields, such as dentistry, optometry, pharmacy, or veterinary medicine.

Historical Faculty - Maximum Cross Credit Points

See *maximum cross credit points*.

History End Date - Institution History; Organizational Unit History

Date and time marking the end of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

History Start Date - Institution History; Organizational Unit History

Date and time marking the start of a period when institution or organizational unit information was current. When changes are made, previous information is retained as a history record.

Hold

See *fee hold*.

holder

Lender, institution, or agency holding legal title to a loan such as the bank that issued the loan, a secondary market that purchased the loan from the bank, or a guarantee agency if the borrower defaulted on the loan.

Hold Category

System-defined classification of an encumbrance as ADMINISTRATIVE, if it relates to an administrative matter, or ACADEMIC, if it relates to an academic matter.

Hold Effect Type

Result of applying a hold to a student or student program attempt. See *system hold effect type*.

Hold Indicator

Specifies that a person currently has a hold applied to his or her record.

Hold Schedule

Includes dates when fee holds are recorded for students defaulting on fee payments.

Hold Type

Institution-defined name that describes the reason for, or the result of, a hold.

Honors Level

Institution-defined level of a Bachelor Honors award that can be mapped to a government honors level.

HPSL

See primary care loan.

IM

See institutional methodology.

income contingent repayment

Under an income contingent repayment schedule, the size of the monthly payments depends on the income earned by the borrower. As the borrower's income increases, so do the payments. The income contingent repayment plan is not available for PLUS loans.

incomplete grade

An incomplete grade is given when circumstances prevent a student from completing program requirements. The course director determines what work is required to remove the incomplete grade.

in-state student

Student who meets the legal residency requirements for the state and is eligible for reduced in-state student tuition at public colleges and universities.

internship

Part-time job during the academic year or summer months a student receives supervised practical training in their field. Internships are often closely related to the student's academic and career goals, and can serve as a precursor to professional employment. Some internships provide very close supervision by a mentor in an apprenticeship-like relationship.

interest

Fee charged by the lender for borrowing money, usually calculated as a percentage of the principal balance of the loan. Percentage rate can be fixed for the life of the loan, or it can be variable, depending on loan terms.

Inactive Calendars

Calendars to which data can no longer be added.

Inactive Institution

Institution for which new data cannot be entered, except for maintaining institution address details.

Inactive Organizational Unit

Organizational unit for which new data cannot be entered, except for maintaining organizational unit address details.

In Charge Indicator - Exam Supervisors

Specifies a supervisor as the senior or organizing supervisor for an exam session at a particular venue.

Include Deleted Indicators

Set to display records that have been deleted.

Include Deleted Relationships Indicator

Causes deleted relationships to be displayed when a query is executed.

Include Resolved Outcomes Indicator - Non-Enrolled Unit Outcomes

Displays resolved outcomes when performing a query on non-enrolled student outcomes.

Income Type

Indicates if an assessed debt amount or a payment amount is to be disbursed.

Indicated Mailing Date

Date an inquiry package is to be mailed.

Industrial

Effective full time student units for a unit of study or part of a unit of study generated by work experience in a particular industry, reported in the student load file.

independent

An independent student is one who fulfills one or more of the following criteria:

- At least 24 years old as of January 1 of the academic year
- Married
- A graduate or professional student

- Has a legal dependant other than a spouse
- A veteran of the U.S. Armed Forces
- An orphan or ward of the court or was a ward of the court until aged 18

A parent refusing to provide support for their child's education is not sufficient for the child to be declared independent. See *dependant*.

industry links

Records any industries associated with a thesis or research candidacy.

IRA

See *individual retirement account*.

individual retirement account

Type of retirement fund. It is illegal to borrow money from an IRA to help pay for a child's education.

Inquiry

A request from a prospective applicant for information.

Inquiry Characteristic Type

Institution-defined classification of prospects, such as postgraduate.

Inquiry Date

Date an inquiry is made.

Inquiry Information Type

Institution-defined classification of inquiries such as accommodation and fees.

Inquiry Package Item

Information sent to the prospective applicants. Package items can be grouped by inquiry information type, by program, or by inquiry level.

inquiry package item reduction

Associating package items with an entry status, to programs for this entry status, and further to unit sets in each of the programs.

Inquiry Source Type

Classification of source that prompts an admission inquiry, such as newspaper advertisement or school liaison activity.

Inquiry Status

Institution-defined status of an inquiry. An inquiry status is first Received, then Acknowledged and finally Completed when the information requested is sent.

insurance fee

Fee given by a lender to the federal government as insurance against default. Insurance fee is charged when the loan is disbursed and is typically 1 percent of the amount disbursed. See *guarantee fee*.

institutional student information report

Institutional Student Information Reports (ISIR) are the electronic versions of SARs delivered to institutions.

Institution Address

One or more institution address can be recorded, such as, campus address and correspondence address.

institution - basis details

Institution where a student took the courses resulting in unit advanced standing.

Institution Code

Institution-defined code for an institution that can be mapped to a government institution code.

Institution Fee

Institution-wide fee levied once, even if a student has concurrent program attempts.

Institution History

Chronological record of changes made to data defining an institution.

institutional methodology

Formula used or referred to by a college or university to determine student need for awarding institutional funds.

Institution Status

Indicates the level of activity of an institution. Institutional statuses are institution-defined and map to the system institution status, including ACTIVE and INACTIVE.

installment loan

Consumer loan if the principal and interest are repaid on a regular, usually monthly, schedule. Payments are called installments and are of equal amounts.

institutional work study

Part-time jobs, either on- or off- campus, obtained by the students with the help of the educational institution.

intermission

Period during which a student takes time off from coursework that is part of a confirmed program attempt.

intermission period

Period for which an intermission is valid. The end date specifies the date when the student is due to resume the program attempt.

internal revenue service

Federal agency responsible for enforcing U.S. tax laws and collecting taxes.

Intake Target Type

Types of applicants an institution has established targets for, such as beginning, regional, and returning students.

internal limit - advanced standing

Maximum amount of advanced standing that can be granted in a program.

International

See person international details.

International Agent Details

Details of an international agent or agency through which a student was recruited.

Invalid Mark and Grade Combination

Mark entered in system is outside the range associated with grades entered in the grading schema.

invalid mark/grade allowed indicator

Indicates if invalid mark and grade combinations can be entered, and used to configure the process for entering online results. Invalid mark and grade combinations must be corrected at a later time.

item limit

Maximum number of assessment items an assessor is allocated. Used by the assignment tracking process to limit the number of assignments sent to each assessor for marking.

ISIR

ISIR: Institutional Student Information Report. A record of student's data approved by the US Department of Education, based on which institutions determine the student's need and eligibility for financial aid.

Key Check-Digit Indicator

Indicates if the two-digit check digit must be entered before an assessment result can be entered for a student, and used to configure the process for entering online results. Check digits are the last two digits of the person ID.

Language Code

Institution-defined code describing the non-English language used at a student's permanent residence that must be mapped to a government language code.

lapsed program attempts

A program attempt in which a student does not enroll in units within the specified time.

Last Submission Date

See *submission date - last*.

Last Year of Enrollment - Basis Details

Year when a person was last enrolled in a program forming the basis of a unit advanced standing.

Latest Processing Date

Last date an inquiry was processed by the Process Admission Inquiries concurrent process.

lender

Bank, credit union, savings and loan association, or financial institution that provides funds to the student or parent for an educational loan.

leveraging

If a school offers a talented student extra financial aid, regardless of need, the student is more likely to enroll. Leveraging is the controversial practice of calculating how to attract such students and customizing aid offers to optimize the quality of the incoming class.

level

Level is an indicator of the relative demand, complexity, depth of study and autonomy of learning. involved in a program.

Level - Hold

Level within the hierarchy of effect types.

Liability

Referring to a student, the amount the student owes as a result of fee assessment. Referring to fees, a fee type when assigned to a fee category.

Library Catalogue Number

Library catalogue number of a completed thesis.

Library Lodgement Date

Date when a research student's thesis is placed in the library.

Load Incurred Indicator

Indicates if load is incurred for a student attempt with the related administrative unit status.

loan forgiveness

Federal Government cancels all or part of an educational loan because the borrower meets certain criteria, such as performing military or volunteer service.

line of credit

A bank, credit union, savings and loan association, or additional financial institution that provides funds to the student or parent for an educational loan. Some schools now participate in the Federal Direct Loan program and no longer use a private lender, since loan funds are provided by the U.S. Government.

loan interviews

Students with educational loans are required to meet with a financial aid administrator before receiving the first loan disbursement and again before graduating or leaving school. During these counseling sessions, called entrance and exit interviews, the financial aid administrator reviews the repayment terms of the loan and the repayment schedule with the student.

loan consolidation

See *consolidation loan*.

Local Currency Indicator

Indicates if a currency code represents currency typically used by an institution.

Local Institution Indicator

Indicates if an institution is the home institution. Only one institution is typically identified as the home institution.

Location

Campus, study center, or other place where an institution conducts business or holds classes. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

Location Code

Code of a location owned or used by an institution. An example of a location code could be EXM90 for a particular examination location.

Location - Maximum Cross Credit Points

See *maximum cross credit points*.

Location Type

Institution-defined classification of locations where an institution conducts business or holds classes. Location types can be mapped to system location types.

lockbox

Accounts maintained by institution with banks. Students use these accounts to make payments towards their charges.

Logical Delete Date - Unit Assessment Item

See *deletion date - unit assessment item*.

Logical Delete Date - Unit Assessment Pattern

See *deletion date - unit assessment pattern*.

Lower Load Limit

Lower load value of the enrollment load range, in credit points, that defines a student's attendance type in an academic period.

Lower Normal Rate Override Indicator

Specifies that a rate for a fee reverts to normal if the normal rate is lower than a contract rate.

Lower Range

See *element range*.

maturity date

Date when a loan becomes due and must be repaid in full.

MDE

See *multiple data entry processor*.

Mail Delivery Working Days

Indicates the average number of working days required for correspondence to reach an examination location using standard mail.

Mailed Date

Date an inquiry package item was mailed.

major exemption institution

Institution where over half of an advanced standing exemption was obtained.

Major Field of Study

Describes which of the specified fields of study is the major.

Mandatory Indicator

Specifies that a particular piece of data must be recorded as part of the enrollment process.

Manual Assessment, Manual Adjustment

Distinguishes assessment transactions created for an individual student through the Manual Fee Assessment window, rather than automatically through the fee assessment process.

manual entry indicator

Specifies that a fee assessment was a manual or system-calculated assessment.

mark

Numerical value indicating a student's level of achievement in a unit attempt.

mark entry mandatory indicator

Specifies that a mark must be recorded and used to configure the electronic upload process and the process for entering online results.

mark/grade invalid

The action taken by the system when a mark and grade combination recorded in the upload file is invalid.

mark range - grade

Minimum and maximum numerical value limiting the range of marks required to receive a particular grade.

Maximum Cross Credit Points

Maximum number of credit points in which a student can enroll in an academic calendar outside of the enrolled program location or mode.

Maximum Intermission

Total months of intermission a student is allowed during a program.

maximum submission date

The last date by which a thesis for a research candidacy can be submitted.

Member Type

Institution-defined classification of organizational units by structure level. Each organizational unit must be assigned a member type, including FACULTY, SCHOOL, DEPARTMENT, and DIVISION.

merit-based

Financial aid that depends on the student's academic, artistic, or athletic merit, for example, and does not depend on the existence of financial need. Uses the student's grades, test scores, hobbies, and special talents to determine eligibility for scholarships.

Merge Table Name

Name of a database table used in the Person Number Merge process.

Milestones - Date Reached

Date when a milestone is completed, successfully or unsuccessfully.

Milestones - Due Date

Date when a milestone is to be completed, calculated from the offset days value, or entered.

Milestone Status

Institution-defined status showing the progress of a milestone.

Milestone Type

Institution-defined classification of milestones, such as six-month report, literature review report, and draft thesis available.

Minimum - Entry Assessment Score

Minimum score required by an applicant to be considered for an offer of admission to a program offering pattern. A program offering pattern assessment score takes precedence over a minimum entry assessment score established at the program offering instance level.

Minimum Submission Date

The earliest date by which a thesis for a research candidacy can be submitted.

Minimum Submission Percentage

Percentage of effective full-time days that must pass before a research thesis can be submitted. This value is used to calculate submission dates for a research candidacy.

Mode - Maximum Cross Credit Points

See *maximum cross credit points*.

multiple data entry processor

Company that processes FAFSA forms submitted by students. The College Scholarship Service (CSS) and PHEAA are both MDE processors.

NHCS

See *National Health Corps scholarship*.

NMSQT

See *preliminary scholastic assessment test*.

NSL

See *nursing student loan*.

NSC

See *National Student Clearinghouse*.

Name of Institution

Institution-defined name of an institution that can be mapped to a government institution. The institution-defined name can be the same as the name of the government institution.

national merit scholarship qualifying test

See *preliminary scholastic assessment test*.

Negative Adjustment

Any activity that partially reduces the balance of a student's account based on fee calculation.

national health corps scholarship

Scholarship program administered by the U.S. Department of Health and Human Services (HHS). Available to medical students studying allopathic and osteopathic medicine and to dentistry students.

need

The difference between the cost of attendance and the expected family contribution is the student's financial need. The financial aid package is based on the need amount. See *cost of attendance* and *expected family contribution*.

need analysis

Process of determining a student's need by analyzing financial information provided by the student, the student's parents, and spouse, if applicable. Need analysis forms include the Free Application for Federal Student Aid (FAFSA) and the Financial Aid PROFILE.

national service trust

National community service program. If a student participates in this program before attending school, the funds can be used to pay educational expenses. If the student participates after graduating, the funds can be used to repay federal student loans. Eligible types of community service include education, human services, the environment, and public safety.

National Student Clearinghouse (NSC)

A non-profit organization that offers degree and enrollment verification services for schools in the United States. Enrollment information provided by NSC is used to service student loans.

need-based

Financial aid that depends on a student's financial situation. Most federal sources of financial aid are need-based.

need-blind

An offer of admission made to a student without considering the student's financial situation. Most schools use a need-blind admissions process. Some schools use financial need to decide whether to include marginal students in the wait list.

New Student

Student enrolled in a program for the first time before the start cutoff date alias has passed.

new borrower

See *first-time borrower*.

need-sensitive

The student's financial situation is taken into account when deciding whether to admit the student. Some schools use need-sensitive admissions when deciding to accept a borderline student or to take the student from the waiting list.

No Assessment

Indicates if a student seeks a formal grade for a student attempt.

Nominated Value

Values of program attributes Location Code, Attendance Mode, and Attendance Type are nominated if the user enters them in the relevant fields in the Enrollments or Admissions windows. See *derived value*.

non-allowable materials - examination

Materials that students are not allowed to take into an examination.

non-examinable assessment item

Assessment item that is not an examination, for example, paper, project, or other assignment.

No Program Attempts - Electronic Results Upload

Electronic results upload configuration setting that defines the action taken by the system if a person specified in the validation file does not have any recorded program attempts.

Note Format Type

System-defined note format, including OLE and text.

Note Types

Institution-defined classification of notes. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's official handbook.

Notification Date

Date a debtor was notified about a fee assessment.

Notional Percentage Grade Distribution

Minimum and maximum percentage of students expected to receive a specific grade for a particular unit offering.

Number Restriction

Limits number of items relevant to a particular admission step, for example, MULTI-OFF allows a maximum number of offers to be established.

number of seats - venue

Maximum number of seats in a venue.

Number Units Before Intermission

Number of units a student must complete before intermission is possible.

nursing student loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS) and available to students enrolled in nursing programs.

Obsolete Person Number

Person number of the obsolete record in the Merge Person Number process.

occupational titles

Indicates occupations associated with programs. For example, for Bachelor of Science in Aeronautics program, an associated occupational title would be Aeronautical Engineer.

Offer Date Response Offset

Number of days added to an applicant's offer date to calculate a default offer response date.

Offered Indicator

Specifies that the unit offering option is available for offering.

Official Notification

See *grade inclusion indicators*.

Offset Alias Value

See *date alias instance offset*.

Offset Date Alias

Event from which the date of another event is calculated by offset. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after

the census date CENSUS, CENSUS is the offset date alias. Offsets can be positive or negative.

Offset Days for Milestone

Number of days entered for a default milestone when defining program default milestones. This number is offset from the candidate's commencement date.

Offset Duration

A period of time before or after an event used to define the date of the event. For example, if the submission date for census information, SUBMIT-DT, is set as four weeks after the census date, CENSUS, the four weeks is the offset duration. Offsets can be positive or negative.

Only as Subordinate Indicator

Specifies that the unit set can only be selected as a subordinate unit set within the related program offering. For example, a particular minor must always be selected within a particular previously selected major.

Optional Payment Indicator

Indicates whether a fee is optional or mandatory. Penalties and encumbrances do not apply to optional payments.

order in award

Order in presentation of a unit set group, or major, in a graduation ceremony.

order in ceremony

Order in presentation of an award in a graduation ceremony.

order in presentation

Graduand position in the order of presentation of a graduation ceremony.

Order of Precedence

Evaluates the fee assessment rate that should apply when a student's method of studying a program fulfills the conditions for more than one fee assessment rate.

Organizational Unit

Business unit of an institution or organization, including faculty, school, department, and division.

Organizational Unit Account

Account linked to an organizational unit that receives disbursement income.

Organizational Unit Address

One or more addresses can be recorded for an organizational unit if they are different address types. For example, an administrative branch can have a postal address and a physical address.

Organizational Unit Code

Institution-defined code for an organizational unit. An organizational unit is identified by its code and start date.

Organizational Unit History

Chronological record of changes made to data defining an organizational unit.

Organizational Unit Location

Physical location of an organizational unit. An organizational unit can have multiple locations. Each location belongs to a location type, such as CAMPUS, which defines its use in the system.

Organizational Unit - Ownership of Unit Version

Code of an organizational unit that owns, or is responsible for, a unit.

Organizational Unit Start Date

Date when an organizational unit is effective. The organizational unit is identified by its code and start date.

Organizational Unit Status

Institution-defined status indicating the level of activity of an organizational unit record, mapped to a system status of ACTIVE or INACTIVE.

Organizational Unit Type

Institution-defined classification of organizational units. Each organizational unit must be assigned an organizational type. Examples include ACADEMIC and ADMINISTRATIVE.

origination fee

Fee paid to the bank for administering the loan. Origination fee is charged when the loan is disbursed and typically is 3 percent of the amount. A portion of this fee is paid to federal government to offset the administrative costs of the loan.

outcome

Grade or mark for a student unit attempt assessment item. Also known as result.

outside resource

Aid or benefits available because a student is in school and calculated after need is determined, such as outside scholarships, prepaid tuition plans, and VA educational benefits.

outside scholarship

Scholarship originating from sources other than the school and federal or state government.

out-of-state student

Students who do not meet the legal residency requirements for the state and are often charged a higher tuition rate at public colleges and universities.

Outcome Date

Date when an outcome is recorded for an assessment item.

overawards

Students who receive federal support cannot receive awards totaling more than \$400 in excess of financial need.

Override Amount Type

Overrides the amount type for a target.

Override Credit Point Increment

Allowable increment by which override credit points can be specified.

Override Credit Point Maximum

Maximum credit points allowed for a unit attempt.

Override Credit Point Minimum

Minimum credit points allowed for a unit attempt.

Override Credit Points Indicator

Indicates if enrolled and achievable credit points can be overridden at the student unit attempt level.

override due date - student unit attempt assessment item

Assessment item due date extension granted to a student.

Override End Time - Exam Session Instance

Used when an examination end time differs from a session end time.

Override End Time - Supervisors

When a supervisor ends supervision of an examination. If no value is specified, the system uses the end time of the exam session as the default.

Override Period

Allows adjustment within the default period of the dates between which a disbursement formula operates. See *default period*.

Override Start Time - Exam Session Instance

Used when an examination start time differs from a session start time.

Override Start Time - Supervisors

When a supervisor starts supervision of an examination. If no value is specified, the system uses the start time of the exam session as the default.

Override Title Indicator

Indicates whether the title of a unit can be overridden at the student unit attempt level.

Override Title - Unit Sets

Overrides the unit set title within a context program version.

Overseas

Indicates an institution based in another country.

Overwrite Grades Allowed Indicator

Indicates if a saved assessment result can be overwritten when entering new results, and used to configure the process for entering online results.

Owning Location

Superior location in a location relationship. For example, a university's location is an owning location of its campuses' locations. A location can have multiple owning locations. See *parent and child relationship*.

packaging

Process of assembling and automatically awarding a financial aid package based on student need.

Paid Date

Date when a thesis panel member is paid.

Paired Date Aliases

Two date aliases that define a period of time. For example, the date aliases for start semester break and end semester break are paired to define the period of the break.

Paired Dates

See *paired date aliases*.

panel

Group of individuals who screen applications or interview applicants.

panel member

An individual who evaluates the prospective student's qualifications.

Panel Chair Indicator

Selected for those institution-defined thesis panel member types that can be the chairperson of an examining panel.

Panel Member Type

Institution-defined classification of members on a thesis panel, for example, chair, ordinary, and reserve.

panel member role

Designated responsibility of a panel member, such as final approver or reviewer.

Paper Name

Name of an examination paper.

Parent and Child Relationship

A system record can be linked to other records in a one-to-one or one-to-many relationship. For example, a school could be set up as the child of a college and the parent of associated departments.

probability value

Indicates the possibility of a prospect applying and finally enrolling as a student.

parent contribution

An estimate of the portion of a student's educational expenses that the parents can afford. Students who qualify as independent are not expected to receive a parent contribution.

parent organizational unit

Superior organizational unit.

Parent Unit Set

Unit set that is in a superior relationship to another unit set. The parent unit set must be included as part of a student unit set attempt. It can have an open end date, if it is completed at the same time as the child unit set, or it can already be complete.

Parent Loan for Undergraduate Students

Federal loans available to parents of dependant undergraduate students to help finance the child's education. Parents can borrow up to the full cost of the child's education, less the amount of any additional financial aid received. Parent Loan for Undergraduate Students (PLUS) loans can replace the expected family contribution.

Payment Advice Number

Identifies a student or sponsor's fee payment received through a bank.

Payment Due Date

Date when payment of a fee liability, or partial payment, is due.

payment ISIR

The ISIR record that Central Processing System verifies and returns to the educational institution is known as a Payment ISIR. See *ISIR* and *awarding ISIR*.

Payment Rank

Determines the order in which payment amounts received should be applied to a student's fee liabilities.

Payment Schedule

Template schedule from which payment due dates for a fee are derived.

PCL

See *primary care loan*.

Pell grant

Federal need-based grant available to undergraduate students.

Percentage

Percentage of credit to grant as unit advanced standing; percentage of load to attribute to a related calendar type.

Percentage Disbursement

See *disbursement percentage*.

Percentage of Program Requirements Granted

Total number of credit points of advanced standing granted divided by the number of credit points required for the program.

Percent Disbursement

When processing journals, determines the portion of calculated disbursement amounts available to budget centers at a point in time.

Perkins loan

Low interest-rate loans awarded to students with exceptional financial need. The student must apply for a Pell Grant to be eligible. Interest on the Perkins loan is subsidized while the student is in school. Formerly known as the National Direct Student Loan Program.

Permanent Resident Code

Institution-defined code indicating a student's permanent residency status that must be mapped to a government permanent resident code.

Permanent Resident Status

Codes indicating whether a student has permanent residency status.

Person

Any individual recorded in Oracle Student System, whether a student, staff member, or other person, with a relationship to an institution.

Person Address

Address or addresses of a person recorded in the system.

Person Alias

Alternative names by which a person is known, such as maiden names.

Person Disability

Impairment or disability recorded for a person.

Person Doesn't Exist

Electronic results upload configuration setting that defines the action taken by the system if a person recorded in the upload file does not exist in the system.

Person International Details

Details recorded for international students, including passport, visa, and citizenship details.

Person Note Type

Institution-defined classification of notes pertaining to a person, for example, ACADEMIC, ADMIN, and DISCIPLINE.

Person Number

Number that identifies a person.

Person Number Group

Group of persons with a common characteristic or characteristics.

Person Number Group Member

Person included in a *person number group*.

Person Number Type

Identifies the system or organization to which an alternate person number belongs.

Person Type

System-defined classification of a person. A person can have multiple types. Examples are faculty, staff, and applicant.

PLUS

See parent loan for undergraduate students.

Planned Calendar

Calendars still under development and not available for use by other subsystems.

practical unit

Specifies that a unit is classified as a practical experience unit, in which case the EFTSU value for the unit is generated by practical work experience.

preclusion

A type of advanced standing granted when prior studies are not equivalent to the specified unit, but are similar. In such cases, the student is not allowed to enroll in the specified unit.

pre-enrollment

Process that creates enrollment records by copying student personal and program details from Admissions to Enrollment.

pre-enroll units indicator

Specifies that student unit attempts for a program offering pattern should be pre-enrolled as part of pre-enrollment.

Preliminary Scholastic Assessment Test

Test taken during the junior year as practice for the scholastic assessment test. Scores on the PSAT are used to select semifinalists for the National Merit Scholarship program.

prepaid tuition plan

College savings plan guaranteed to rise in value at the same rate as college tuition fees. For example, if a family purchases shares that are worth half a year's tuition at a state college, they are always worth half a year's tuition, even if tuition rates have doubled 10 years later.

Primary Assessor

See *Primary Assessor Indicator*.

Primary Assessor Indicator

Specifies that an assessor is the senior, or principal, assessor for an assessment item.

primary care loan

Low interest loan administered by the U.S. Department of Health and Human Services (HHS). Available to medical school students studying medicine, osteopathy, dentistry, veterinary medicine, optometry, and podiatry. Undergraduate pharmacology students are also eligible. To be eligible for this loan, a student must commit to working in the field of primary care. Previously known as the Health Professions Student Loan (HPSL).

Primary Set Indicator

Indicates that a unit set is a primary set. Primary unit sets appear on official documents. A unit set ranked lower than another unit set that exists in a student unit set attempt and administrative unit sets cannot be set as primary sets.

primary program

Program used to process enrollment validations for a program attempt in a career-centric mode. This program is also used for all progression purposes.

principal

Indicates either the amount of money borrowed or unpaid amount of a loan. Interest is charged as a percentage of the principal. Insurance and origination fees are deducted from the principal amount before disbursement.

Prior Education

Statistical details related to a student's prior educational experience.

Priority Code - Venue

Indicates an order of preference when allocating examinations to venues, with no associated system functionality.

private loans

Education loan programs established by private lenders to supplement the student and parent education loan programs available from federal and state governments.

probation

A student is placed on academic probation when progress is not satisfactory. It is not a penalty but a warning and an opportunity to improve.

processing year

Longest period of time when the processing of financial aid applications occurs for an academic year. Processing years can start 12 months in advance of an academic year.

professional degree

Degree awarded in a field such as law, education, medicine, pharmacy, or dentistry.

professional judgement

For need-based federal aid programs, the financial aid administrator can adjust the expected family contribution, adjust the cost of attendance, or change the dependency status when extenuating circumstances exist. For example, if a parent dies or if a parent becomes unemployed or disabled, the financial aid administrator can use estimated income information for the award year instead of the actual income figures from the base year. Delegation of authority from the Federal Government to the financial aid administrator is known as professional judgement.

PROFILE

A financial aid application generated by the College Scholarship Service based on the Financial Aid Form (FAF) filled out by students. Most institutions and universities use the PROFILE application to collect additional financial information. Some institutions use the PROFILE to determine student eligibility for institutional funds.

program

A program is a grouping of one or more units of study which may or may not lead to a formal award. Examples include, a generic undergraduate Bachelor of Arts program, a specific undergraduate Bachelor of Science in Computer Engineering program, and a generic Undergraduate program wherein all students are enrolled.

Program Annual Load

Number of credit points that constitute a full-time load for each year of a program version.

Program Annual Load Unit Link

Linking unit versions to program annual loads to calculate Effective Full Time Student Units.

Program Attempt

See *student program attempt*.

Program Attempt Contribution Option

Option chosen by a student for the payment of his or her contribution liability for a program attempt.

Program Attempt Status

Statuses derived by the system based on a student's enrollment, including Enrolled, Lapsed, Inactive, and Discontinued.

Program Category

Institution-defined classification of programs enabling inquiry, reporting, and manipulation of programs grouped together.

Program Code

Identifies a program.

Program Fee Trigger

Program code indicating that students in that program are to be assessed for a fee.

Program Group

Collection of programs with common institution-defined properties.

Program Group Code

Identifies a program group.

Program Grouped

Indicates if a unit is program grouped.

Program Group Fee Trigger

Program group code indicating that students in those programs are to be assessed a fee.

Program Group Member

Program version that belongs to a program group.

Program Group Type

Classification assigned to program groups to further define them, for example, program equivalent and common entrance requirements. Each program group must be mapped to a system program group type.

Program Note Type

Defines the purpose of a note related to a program. For example, a HANDBOOK note type can refer to notes containing information for publication in an institution's official handbook.

Program Offering

Association of a program version with a calendar type. An association with a different calendar type constitutes a new program offering. For example, the program version A300 - Bachelor of Arts, version x could be assigned to calendar Standard Academic Year, meaning that it is possible to offer the course in any calendar of that type. A course version may be offered in calendar types 'Standard Academic Year' and 'MBA Calendar', constituting two different offerings of the course. This permits different options to be applied to the separate offerings.

Program Offering Instance

Specific time when a program is offered, defined by the calendar instance when the program version is offered.

Program Status

Specifies the status of activity, or availability, of a program version.

Program Type

Institution-defined classification of higher education programs, such as higher doctorate, diploma, and non-award program.

Program Type - Basis Details

Program type of a program forming the basis of a unit advanced standing.

Program Type Fee Trigger

Program type code indicating that students in programs of that type are to be assessed a fee.

Program Type Group

Institution-defined collection of program types for estimating census date enrollment statistics, for example, higher degree by research and other postgraduate.

Program Type Group Code

Identifies a program type group.

Program Type Restrictions

Restrict admission categories to particular program types.

Program Version Reference

Identifies the program version to which a correspondence item is related.

Provisional Indicator

Specifies that a student's admission and enrollment in a program is pending permanent arrangements. The indicator must be selected manually.

promissory note

A binding legal document specifying the terms of a loan and obligating the borrower to repay the loan. Signed by the borrower before funds are disbursed by the lender. Includes information related to repayment schedule, interest rate, deferment policy, and cancellations.

prospect

A potential applicant who inquires about the educational institution and for whom an inquiry record is created.

PSAT

See *preliminary scholastic assessment test*.

publish outcomes indicator

Indicates if a student assessment results should be published.

qualification recency

Number of years during which other studies are recognized for granting advanced standing in a program.

Question or Title - Assessment Item

Question or title of a non-examinable assessment item.

Range Number

Number assigned by the system to an element range.

Rank - Unit Sets

Describes the relative position of a unit set category to other categories, for example, a major has a higher rank than a minor.

Rate

See *charge rate*.

Rate Number

Number assigned by the system to a fee assessment rate.

Rating Scale

Identifies the scale of values used to rate admission applications. For example, a rating scale named Letter can be created with rating scale values of A for Excellent, B for Average, and C for Poor.

RA

See *research assistantship*.

reaching school

A student's preferred school, but the school is not obliged to admit the student. See *safety school*.

renewable scholarship

Scholarship awarded for more than one year. Usually, the student must maintain certain academic standards to be eligible for subsequent years of the award. Some renewable scholarships require the student to reapply for the scholarship each year; others require a report on the student's progress.

Rating Value

User-defined value used to rate admission applications.

Re-Admission

Process by which a person seeks to re-enter a program in which he or she was previously enrolled.

Recipient

Registration ID and name of the person to whom a tracking item is sent for a particular step.

Recommendation Summary

Text field for entering a summary of an assessor's comments regarding the assessment or thesis result he or she recommends.

Recommended Panel Size

Indicates the recommended number of members for a thesis panel.

Recommended Result

Recommended assessment or thesis result submitted by an assessor.

Reference Code

Reference code for a unit from an external system. For example, a voice response code.

Reference Code Type

Classification of unit reference codes from external systems.

Reference - Unit Assessment Item

Identifying code, including numbers or other characters, of a unit assignment, examination, or other assessment item.

Refunds

See *retention schedule*.

Rejected Applicant

Applicant who has not met requirements for admission.

repayment schedule

Provides details of the monthly payment, interest rate, total repayment obligation, payment due dates, and term of the loan.

repayment term

Period during which the borrower is required to make payments on outstanding loans. Usually indicated as a number of payments or years when the payments are made monthly.

Repeatable Indicator

Indicates if a student can repeat a unit he or she already passed for additional credit toward program requirements.

research assistantship

Financial aid awarded to graduate students to help support their education. Research assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. The research assistant is required to perform research duties.

Research Indicator

Specifies that a unit is classified as a research unit.

Research Percentage - Attendance Type

Describes the attendance percentage allocated to an attendance type for research students, for example, Full-time, or 100% and part-time, or 50%.

Research Supervisor

Individual responsible for reviewing a research project.

Research Supervisor - Principal Indicator

Indicates that a research supervisor type represents the lead or most significant supervisor for a research project.

Research Supervisor Type

See *supervisor type*.

Research Topic

Subject to be studied or researched by a research student.

Reserved Enrollment

Subset of the enrollment quota that is currently reserved.

reserved seats

Seats reserved in unit sections for specific groups of students.

Resolved Indicator - Non-Enrolled Outcomes

Specifies that an non-enrolled outcome has been resolved.

Responsible Organizational Unit

Organizational unit responsible for a program version or unit set.

Restrict - Funding Source

Indicates if students enrolling in a program are restricted to funding sources appearing in this set.

Result

Grade or mark for a student unit attempt assessment item. Also known as outcome. See *system result type*.

Result Type

Classification of assessment outcomes or grades.

Retention Schedule

Template schedule from which dates can be derived after which the institution retains all or a portion of an amount assessed for a fee, in the event that a student's liability reduces after reassessment. Amounts paid and not retained are available for refund.

Retroactive Date

Date up to which fee assessment can be run with a retroactive effective date.

Returning Students

Student enrolled in a program for the first time after the start cutoff date alias has passed.

review group

Group of applications, within a review profile, which is attached to appropriate evaluators.

review profile

Group of applications for evaluation. The applications can be grouped for review by applicant surname, institution address, applicant address, market code, organization, and program.

source categories

Logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. Examples include athletics details, educational goals, academic interests, and qualifications.

source type

Type of information to be imported to Oracle Student System, such as applications, inquiries, and test scores.

step group type

System-defined classification of admission, enrollment, research, or tracking steps according to their relation to students, programs, or units.

step order

Sequence in which admission, enrollment, research, or tracking steps are performed. The step order does not apply to certain step group types.

step type

System-defined step in the admission, enrollment, research, or tracking processes.

student intake targets

Established target for the number of students of a type that an educational institution must enroll in a year.

Review Date - Program Version

Date when a program version is due for review. No automatic closure or rollover is implied by this date.

Review Date - Unit Sets

Date when a unit set version is due for review.

Review Date - Unit Version

Date when a version of a unit is due for review.

Rollover Destination Calendar Instance

Fee period into which a fee structure is to be rolled.

Rollover Source Calendar Instance

Fee period from which a fee structure is to be rolled.

Rule Check Indicator

Indicates if the system is responsible for rules relating to a student program attempt. If a student will no longer be checked successfully by the system, selecting No causes the student to be checked manually.

Rule Description

Name of a disbursement rule.

Rule Sequence Number

Identifies rule to be used in fee assessment.

Rule Text

Defines the operation of a disbursement rule.

SAT

See *scholastic assessment test*.

Safety Net for Upfront Payment

Indicates if a student who has selected the up-front payment option has opted for the safety net, in which the institution changes the up-front option to the deferred option if the student cannot make the up-front payment by the due date.

safety school

A school that most certainly admits the student. See *reaching school*.

satisfactory academic progress

Progress criteria that a student is required to meet to receive federal aid.

Scheduled Indicator - Assessment Item

Indicates if an examinable assessment item is included in an examination timetable.

Sallie Mae

Largest secondary market holding approximately one third of all educational loans. Formerly known as the Student Loan Marketing Association (SLMA).

Schedules

See *Encumbrance schedule*, *payment schedule*, and *retention schedule*.

scholastic assessment test

One of two national standardized college entrance examinations used in the U.S. The other is the American College Testing Program. The SAT, previously known as the Scholastic Aptitude Test, is administered by the Educational Testing Service (ETS). Most universities require either ACT or SAT as part of an admission application. See *American College Testing program*.

scholarship

An undergraduate student can receive financial aid in the form of sponsorships. A sponsor can undertake to pay all or a portion of a student's tuition and fees, for specific terms. Scholarships are a form of gift aid and are not repaid. Most scholarships are restricted to students in specific programs of study or with academic, athletic, or artistic talent.

Scholarships - Conditions

Describes conditions that must be met to retain a scholarship.

Scholarships - Dollar Value

Describes the dollar value of a monetary scholarship.

Scholarships - Other Benefits

Describes any other benefits of a scholarship.

scholarship search service

Service that charges a fee to compare the student's profile against a database of scholarship programs.

Scholarship Type

Classification of scholarships that must be mapped to an organization unit or to a person number.

Scholarship Type Code

Institution-defined code to identify scholarship types.

School Code

Code that identifies a secondary education school.

School Type

System-defined classification of secondary education schools, for examples, STATE, INDEPEND, and OTHER.

secondary market

Organization buying loans from lenders, providing the lender with capital to issue new loans. Selling loans is a common practice among lenders, and the bank a student makes payments to can change during the life of the loan. The terms and conditions of a loan do not change when it is sold to another holder. Sallie Mae is the nation's largest secondary market and holds approximately one third of all educational loans.

Second Percentage

Used when a teaching calendar is related a second time to a load calendar instance.

secondary program

Programs in a career, other than the primary program.

Selection Criteria - Thesis Panel Type

Describes selection criteria for members of an examination panel, including required qualifications and years of experience.

selective service

Registration for the military draft. Male students who are U.S. citizens and have reached the age of 18 and were born after December 31, 1959 must be registered with Selective Service to be eligible for federal financial aid. If the student did not register and is older than 25, and the school determines that the failure to register was knowing and willful, the student is ineligible for all federal student financial aid programs. The school's decision as to whether the failure to register was willful is not subject to appeal.

self-help aid

Financial aid in the form of loans and student employment.

Self Help Group Indicator

Specifies that a student wants to participate in a self-help group for an enrolled program attempt.

Service Academy

U.S. Air Force Academy, U.S. Coast Guard Academy, U.S. Merchant Marine Academy, U.S. Military Academy, and U.S. Naval Academy. Admission is highly selective as students must be nominated by their Congressional Representative in order to apply.

servicer

Organization collecting loan payments and performing additional administrative tasks associated with maintaining a loan portfolio.

Sequential Indicator

Determines if an item's tracking steps must be completed in sequence and if calculated action dates for steps are progressive.

Session

Each use of Oracle Student System, from logging on to logging off.

Session Date

Date when an examination session is held.

Session Number

Identifies a session within a selected examination calendar.

Sessions At Institution - Exam Supervisors

Number of examination sessions a supervisor has supervised at the home institution used to indicate a supervisor's level of experience.

Sessions At Other Institutions - Exam Supervisors

Number of examination sessions a supervisor has supervised at other institutions, used to indicate a supervisor's level of experience.

secured loan

Loan backed by collateral. If a student fails to repay the loan, the lender can seize the collateral and sell it to repay the loan. Auto loans and home mortgages are examples of secured loans. Educational loans are generally not secured.

show cause

Students with unsatisfactory academic progress are required to justify continuation in their program.

simple interest

Interest paid only on the principal balance of the loan and not on any accrued interest. Most federal student loan programs offer simple interest.

simplified needs test

The federal methodology ignores assets when calculating the expected family contribution. If parents have an adjusted gross income of less than \$50,000 and if every family member is eligible to file an IRS Form 1040A or 1040EZ or does not need to file a federal income tax return and if a student filed a 1040 but was not required to do so, then that student can be eligible for the simplified needs test.

SLMA

See *Sallie Mae*.

Short Paper Name

See *paper name*.

Show on Official Notification Indicator

Specifies that unit sets or unit attempts with a particular administrative unit status are shown on official documents, such as academic transcripts and diplomas. For academic unit sets, the default setting is select. For administrative unit sets, the default setting is deselect.

sought outcome

Special consideration outcome that a student identifies as the desired result of his or her application.

Source Categories

Source categories are logical groups of attributes used to define the rules involved when importing prospect or admission records from an outside source. They are also used to build self service application types and to declare elements as mandatory.

source program attempt

A program attempt, from which a student takes a transfer.

Special Award

Award other than a program or honorary award, including prizes and medals. Special awards can be announced at graduation ceremonies.

Special Consideration Category

Identifies the basis for a special consideration application.

Special Consideration Outcome

Result of a special consideration application.

Special Grade Type

System-generated classifications that identify students requiring deferred, special, or supplementary examinations, and grades that can be overwritten during the electronic results upload process.

special requirements

External program or units that must be taken in order to complete the program attempt.

Sponsor Code

Identifies a person or organization acting as a sponsor for a student.

Sponsorship

Arrangement in which a person or organization pays student fees in full or in part.

Sponsorship Limit

Amount that a sponsor does not exceed when paying a student's fees.

Sponsor Status

Code indicating the standing of a sponsor within an institution that maps to a system sponsor status.

Sponsor Type

Classification of sponsors, for example, CORPORATE and FACULTY.

SSIG

See *state student incentive grants*.

Stafford loans

Subsidized and unsubsidized federal loans. Subsidized loans are need-based while unsubsidized loans are not. Interest on subsidized Stafford loans is paid by the federal government while the student is in a school and during the six month grace period. Unsubsidized Stafford loans can be used to replace the expected family contribution. See *subsidized loan* and *unsubsidized loan*.

stage

The point in a program where a decision is taken on progression to the next phase or on awarding of the relevant qualification or degree.

Standard Annual Load

Describes the load, in credit points, that a full-time student normally studies in a year if enrolled in a program, and used to calculate the relative weighting of units.

Standard Full Time Completion Time

A government code that indicates the standard time to complete the requirements of a program on a full-time basis. For example, 30 equals 3 years.

student loan marketing association

See *Sallie Mae*.

Standard Part Time Completion Time

A government code that indicates the standard time to complete the requirements of a program on a part-time basis. For example, 60 equals 6 years.

statement of educational purpose

A legal document that the student agrees to use financial aid for educational expenses only. Students must sign this document before receiving federal need-based aid.

student aid report

Summarizes information included in the Free Application for Federal Students Aid (FAFSA). Student Aid Report (SAR) must be provided to an institution because it also indicates the amount of Pell Grant eligibility, if any, and the expected family contribution. Students receive a copy of the SAR four to six weeks after filing a FAFSA.

Start Date Alias - Fee Assessment Processing

First date when an effective date for fee assessment processing can be set.

Start Date of Calendar Instance

Date when a calendar instance becomes effective.

Start Date - Fee Period

First date of a fee period.

Start Date - Grading Schema

First date of a grading schema version.

Start Date - Institution Address, Location Address, Organizational Address

Date when an address for an institution, location, or organizational unit becomes effective.

Start Date - Organizational Unit

Date when an organizational unit becomes effective. An organizational unit is identified by its code and start date.

Start Date - Person Statistics

Date when a student's statistical information is effective.

Start Date - Program Offering Instance

Date when a program offering instance becomes effective.

Start Date - Program Version

Date when a program version becomes effective.

Start Date of Tracking Item

System-generated date when an item is initiated which cannot be altered.

Start Date - Unit Sets

Date when a unit set version becomes effective.

Start Date - Unit Version

Date when a unit version becomes effective.

Start Time - Exam Session

Time an examination session commences.

Start Time - Unit Class

Time a unit class commences.

state student incentive grants

State-run financial aid program for state residents. States receive equal funds from the Federal Government to help them fund the program.

Statement of Account

Used for the invoice sent to students or sponsors after fee assessment.

Status of a Thesis

System-generated status indicating the progress of a thesis, such as pending, submitted, and examined.

Step

See *admission step, enrollment step, tracking step, tracking type step*.

Step Complete Indicator

Set by a step's recipient or a tracking item's originator when a step has been completed.

Step Group Type

System-defined classification of admission, enrollment, research, or tracking steps according to their relation to students, programs, or units.

Step Order

Sequence in which admission, enrollment, research, or tracking steps are performed. The step order does not apply to certain step group types.

Step Type

System-defined step in the admission, enrollment, research, or tracking processes.

student accounts office

See *bursars office*.

student contribution

Sum of money the Federal Government expects students to contribute to their education and included as part of the expected family contribution. Standard

contributions depend on the student's income and assets but can vary from school to school.

Student Commencement Type

Indicates whether the student has enrolled for the first time or is a returning student. See *New Student and Returning Student*.

student program attempt

Enrollment of a student in a particular program offering option.

Student Target

Numeric range for goal of admission of applicants with certain characteristics to programs of study. Targets can be defined for organization units, by funding source, by program offering pattern, by unit set, by program type, program attendance mode, and by unit internal program level.

student unit attempt

Enrollment of a student in a particular unit offering pattern.

student unit attempt assessment item

See *assessment item*.

supplemental loan for students

Federal loans for financially independent students. This program was discontinued in 1994 with the introduction of unsubsidized Stafford loans program.

subsidized loan

The government pays interest on the loan, such as the Perkins loan or the subsidized Stafford loan, while the student is in a school, during the six-month grace period, and during any deferment periods. Subsidized loans are need-based and cannot be used to replace the family contribution. See *Stafford loans* and *unsubsidized loan*.

SubLocation

Subordinate location in a location relationship. For example, a campus location is a sublocation of the university location. A location can have multiple sublocations. See *parent and child relationship*.

Submission Date - Expected

Date specified by the candidate when he or she expects to submit a thesis for examination.

Submission Date - Last

Date when a thesis is submitted for examination.

Subordinate Calendars

See *calendar instance relationship*.

Subordinate Unit

Sub unit to a superior unit.

Subordinate Unit Version

Sub unit version to a superior unit version.

Successful Applicant

Applicant eligible to receive an offer.

Superior Calendars

See *calendar instance relationship*.

Superior Unit

Unit with subunits.

Superior Unit Version

Unit version with subunit versions.

Supervision - End Date

Date when a supervisor's service for a research candidacy ends.

Supervision - Funding Percentage

Percentage of a research load apportioned for funding purposes to a specified organizational unit.

Supervision - Organization Unit

Organizational unit a supervisor works for when serving as supervisor.

Supervision Percentage

Percentage of supervision undertaken by a supervisor, used to calculate the research load incurred by supervisors within an institution.

Supervision - Profession

Supervisor's profession.

Supervision - Replaced Person Number

Person number of a replaced supervisor for the supervision history for a research candidacy.

Supervision - Start Date

Date when a supervisor becomes effective for a research candidacy.

supervisor instructions

Special instructions for supervisors administering an examination.

Supervisor Limit

Maximum number of supervisors typically allocated to a venue.

Supervisor Type

Institution-defined classification of supervisors for assessment or research.

Supplementary Assessment

Additional assessment item given to a student because the student failed during the normal assessment period. Supplementary assessment is typically the outcome of a special consideration application.

Supplementary Examination

Additional examination given to a student because the student failed during the normal assessment period.

Supplementary Examinations Permitted

Indicates if supplementary examinations or other assessment can be undertaken by students enrolled in a program.

Supplied Materials - Examination

Materials supplied to students for an examination.

supplemental education opportunity grants

Federal grant program for undergraduate students with exceptional need. SEOG grants are awarded by the school's financial aid office. To qualify, a student must also be a recipient of a Pell Grant.

System Admission Application Status

System-defined status to which an institution-defined admission application status is mapped, including RECEIVED, COMPLETED, and WITHDRAWN.

System Admission Conditional Offer Status

System-defined status to which an institution-defined admission conditional offer status is mapped, including PENDING, SATISFIED, and WAIVED.

System Admission Documentation Status

System-defined status to which an institution-defined admission documentation status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

System Admission Entry Qualification Status

System-defined status to which an institution-defined admission entry qualification status is mapped, including NOT-APPLIC, PENDING, and SATISFIED.

System Admission Fee Status

System-defined status to which an institution-defined admission fee status is mapped, including EXEMPT, ASSESSED, and RECEIVED.

System Admission Offer Deferment Status

System-defined status to which an institution-defined admission offer deferment status is mapped, including PENDING, APPROVED, and REJECTED.

System Admission Offer Response Status

System-defined status to which an institution-defined admission offer response status is mapped, including PENDING, ACCEPTED, and LAPSED.

System Admission Outcome Status

System-defined status to which an institution-defined admission outcome status is mapped, including PENDING, OFFER, and COND-OFFER.

System Admission Process Type

System-defined classification for direct admission processes, for example, re-admission and program transfer.

System Admission Unit Outcome Status

System-defined status to which an institution-defined admission unit outcome status is mapped, including OFFERED and REJECTED.

System Amount Type

Indicates how an intake target type is measured, including EFTSU, PERCENTAGE, PERSON, and WEFTSU.

System Assessment Type

System-defined classification of assessment types to which an institution-defined assessment type can be mapped, including ASSIGNMENT and NONCENTRAL.

System Assigned Indicator - Grading Schema

Specifies that a grade can only be assigned by system processes.

System Calendar Status

System-defined reference data assigned to a calendar status defined by an institution to indicate if a calendar is planned, active, or inactive.

System Charge Method Type

See *charge method*.

System Contribution Payment Type

System-defined classification of contribution payment types to which a government contribution payment option maps, that allows the system to determine how a student discharges a contribution liability.

System Default Indicator

The default institution-defined status if more than one is mapped to a system-defined status.

System Fee Hold Status

System-defined status to which an institution-defined fee encumbrance status is mapped, including WAIT APRVL, APPLIED, and CANCELLED.

System Fee Sponsorship Status

System-defined status to which an institution-defined fee sponsorship status is mapped, including ACTIVE, EXPIRED, and CANCELLED.

System Fee Structure Status

System-defined status to which an institution-defined fee structure status is mapped, including ACTIVE, INACTIVE, and PLANNED.

System Fee Trigger Category

Restricts triggers that can be applied to a fee liability of a particular fee type, including INSTITUTN, for institution-wide fees with no triggers attached to fee liability, and COURSE.

System Fee Type

System-defined classification of fee types, for example, CONTRIBUTION, TUITION, and OTHER. CONTRIBUTION and TUITION fee types can be reported to the government.

System Generated Indicator

Indicates if an inquiry package is produced by the system.

System Hold Effect Type

Describes the effect of placing a hold on a student or a student program attempt.

System Inquiry Status

System-defined status to which an institution-defined inquiry status is mapped.

System Institution Status

System-defined status that defines an institution's level of activity and to which an institution-defined institution status is mapped, including INACTIVE or ACTIVE.

System Intake Target Type

System-defined classification of intake target types, for example, COMMENCEMENT, RETURNING, TOTAL, and USER-DEFINED.

System Location Type

System-defined classification of locations used to determine associated functionality. Location type can be mapped to system location types.

System Organizational Status

System-defined status that defines an organizational unit's level of activity and enables functionality, and to which an institution-defined organizational unit status is mapped, including ACTIVE or INACTIVE.

System Person ID Type

System-defined classification of person ID types that has associated functionality. Institution-defined person ID types are mapped to system person ID types and inherit the associated functionality.

System Program Group Type

System-defined classification of program groups. Each program group must be assigned a program group type. Examples include equivalents and common entrance requirements.

System Program Status

System-defined status that indicates the level of program activity of a program version. A program is established with a status of PLANNED. For students to be enrolled in the program, it must have a status of ACTIVE.

System Reference Code Type

System-defined classification of reference code types that defines the use of a program entry point reference code.

System Result Type

System-defined classification of result types, including PASS, FAIL, INCOMPLETE, and WITHDRAWN.

System Sponsor Status

System-defined status to which an institution-defined sponsor status is mapped, including ACTIVE and CANCELLED.

System Tracking Status

System-defined status, including ACTIVE, CANCELLED, and COMPLETE.

System Tracking Type

System-defined classification of tracking types associated with specific functionality. Each institution-defined tracking type is mapped to a system tracking type.

System Unit Mode

System-defined mode of offering a unit, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on-campus and off-campus.

System Unit Status

System-defined unit status to which an institution-defined unit status is mapped, including PLANNED, ACTIVE, and INACTIVE.

system validations

System-defined checks for enrollment that are performed regardless of setup specifications. These include validating person and unit steps, such as checking for holds and closed section overrides.

TA

See *teaching assistantship*.

Target

Minimum target to be reached.

teaching assistantship

Financial aid awarded to graduate students to help support their education. Teaching assistantships usually provide the graduate student with a waiver of all or part of tuition, plus a small stipend for living expenses. A TA is required to perform teaching-related duties.

Target Days

Indicates maximum number of days a tracking item of a particular type takes to complete, used by the system with the business-days-only indicator to calculate the completion-required-by date for an item.

term

Number of months or years during which the loan is to be repaid.

term calendar

Term, in an academic period, in which students are to be pre-enrolled.

term record

Institution-defined classification of thesis types, such as written and oral.

Tax File Number Invalid Date

Date an institution is notified that a student supplies an invalid tax file number.

Test of English as a Foreign Language

Most colleges and universities require international students to take the TOEFL as part of the admission application. TOEFL evaluates a student's ability to communicate in and understand English.

Tax File Number Recorded Date

Date when a student's tax file number is recorded in the system.

Teaching Period Code

Code used for extracting academic results for export, which is mapped to institution-defined teaching calendars.

Teaching Responsibility

Percentage allocation of teaching responsibility to an organizational unit for a unit of study.

Testamur

Official printed document indicating the conferral of an award.

Test Run

Parameter enabling the fee assessment routine, when initiated from the Fee Assessment Routine and Trace job, to run without updating the database while still supplying a report of the processing decisions.

Thesis Examination Type

Institution-defined classification of thesis types, such as written and oral.

Thesis Format

Text field to record the format of a thesis.

Thesis Panel

Administers thesis examinations.

Thesis Panel Type

Institution-defined classification of thesis panel types.

Thesis Result

Thesis assessment outcome or grade.

Thesis Result Code

Institution-defined code that must be mapped to a system thesis result code. System thesis result codes include the final results: FAIL, FAIL-ALT, NO RESULT, and PASS, and codes for incomplete, or interim, results: MINOR-REV and REV-MAJOR. Incomplete results can be recorded for a thesis examination, but not a thesis.

Thesis Result - Thesis Examination

Assessment outcome or grade of a thesis examination resulting from panel member recommendations.

Thesis Topic

Text field containing the topic of a thesis.

Time Limitation

Maximum number of years students have to complete a program offering option.

Times Keyed

Number of times an outcome has been entered.

timeslots

Period in which a student can enroll.

Title

Full title of a research student's thesis.

Title IV loans

Title IV of the Higher Education Act of 1965 created several education loan programs, collectively referred to as the Federal Family Education Loan Program (FFELP). These loans, also called Title IV loans, are subsidized and unsubsidized Federal Stafford loans, Federal PLUS loans, and Federal consolidation loans.

Title IV school code

Required for completion of the Free Application for Federal Student Aid. This code is a six-character identifier starting with one of the following letters: O, G, B, or E.

TOEFL

See test of english as a foreign language.

Total Credit Points Approved

Total credit points approved as advanced standing.

Total Credit Points Granted

Total credit points granted as advanced standing.

Tracking Group ID

Institution-defined code identifying a group of tracking items.

Tracking Group Status

System-derived status indicating a tracking group's progress, including ACTIVE, if any tracking items are active and COMPLETE, if all tracking items are complete or cancelled.

tracking ID

See Tracking Item ID.

tracking item

Document or process monitored by the Tracking subsystem.

tracking item group membership

Membership of a tracking item in a tracking group or groups.

tracking item ID

System-generated identification number of a tracking item.

tracking item originator

Name and identification number for a person who created a tracking item.

tracking item subject

Name and identification number for a person who is the subject of a tracking item, typically, a student.

tracking note type

Classification of tracking notes.

tracking status

Institution-defined status of a tracking item mapped to a system tracking status.

tracking step

Activity required for processing a tracking item, identified by a system-generated number representing the order the step is completed if the sequential indicator is set.

tracking step group type

See *step group type*.

Tracking Step Order

See *step order*.

Tracking Type

Institution-defined classification of tracking items that map to system-defined tracking types, including ASSESSMENT, MANUAL ADJ, PAYMENT, and RETENTION.

Tracking Type Step

Identified by a system-generated number and used as a default activity in the processing of a tracking item of the same type.

Transaction

Positive or negative amount that a student pays or owes.

transcript

An official statement of student academic performance and progress.

transfer

Change from a student's original program, unit, or unit set attempt to a different one. For example, a student can transfer from a generic Bachelor of Arts in Psychology program to a more specialized one such as Bachelor of Arts in Clinical Psychology.

Trigger

Program, group of programs, unit, unit set, or trigger group recorded for a fee liability matched against a student's program, unit attempts, or unit set to determine if the student is liable for a particular fee. See *program fee trigger*, *program group fee trigger*, *program type fee trigger*, *unit trigger*, *unit set trigger*, and *trigger group*.

Trigger Group

Group consisting of program, unit, and unit set triggers and acting as a single trigger.

UCAS

See *universities and colleges admissions service*.

Unconditional Offer

Standard offer of admission to a program, including details of any advanced standing offered.

undergraduate student

A student who has not yet earned a bachelor's degree, is a candidate for an additional bachelor's degree, or is pursuing additional undergraduate course work.

unearned income

Interest income, dividend income, and capital gains.

unit

Courses that students take to satisfy requirements. Examples include, ENGL101 – Introduction to English literature, CHEM101LE – First year Chemistry Lecture and CHEM101LAB – First year Chemistry Lab.

Unit Assessment Item

See *assessment item*.

Unit Attempts

See *student unit attempt*.

Unit Attempt Status

System-defined status of a unit attempt.

Unit Category

Grouping of units with a common characteristic or characteristics.

Unit Class

Class in which a unit is taught.

Unit Code

Identifies a unit. Examples may include ACC120 for Introduction to Financial Accounting and BIO101 for Fundamentals of Genetics.

unit deletion cut-off date alias

If advanced standing is granted on or before this date, an enrolled student unit attempt, linked to a teaching period, can be deleted.

Unit Discontinued

Electronic results upload configuration setting that defines the action taken by the system when a unit attempt recorded in the upload file is discontinued.

Unit Grading Schema Precedence Indicator

Indicates if grading schema attached to a unit offering option takes precedence over grading schema attached to an enrolled student's program offering.

Unit Internal Program Level

Internal program level grouping of a unit for calculation of weighted effective full time student units.

Unit Level

Level of a unit in a normal year.

Unit Mode

Means by which a unit can be studied. Each institution-defined unit mode must map to a system-defined unit mode, including ON for on-campus, OFF for off-campus, and COMPOSITE for both on-campus and off-campus.

Unit Not Enrolled

Electronic results upload configuration setting that defines the action taken by the system when a student is not enrolled in a unit recorded in the upload file.

Unit Offering

Availability of a unit version to students specified by naming the teaching calendar in which a unit is to be offered.

Unit Offering Pattern

Availability of a unit version in terms of attendance mode and type.

Unit Placement

Recommendation for placement in a particular unit, based upon an applicant's admission test score results.

unsecured loan

Loan not backed by collateral, representing a greater risk to the lender. The lender can require a cosigner on the loan to reduce risk. If a borrower defaults on the loan, the cosigner is held responsible for repayment. Most educational loans are unsecured loans. In the case of federal student loans, the federal government guarantees repayment of the loans.

unit section

A unit section defines how a unit will be offered within a particular timeframe. For example, a unit section for ART101- is defined in terms of the location where the unit is offered (Belmont Campus), the time (evening class) and mode of class (on campus as opposed to, for example, online or by correspondence).

unit set

Unit sets are used to define a path of study undertaken to ensure the satisfactory progression and completion of student program attempts. Unit sets can be differentiated as academic or administrative.

Academic unit sets are those that further define the path of study a student has selected for example, a Major in Accounting or specialization in Taxation.

Administrative unit sets can be used to restrict the set of pathways a student can follow within a course. For example: a Bachelor of Business that has two STREAMS- Accounting, Banking and Finance and Economics MAJORS in administrative unit set STREAM1 and Management, Marketing and Communications MAJORS in administrative unit set STREAM2.

universities and colleges admissions service

Central organization that manages admissions for prospective students in the United Kingdom.

unit set attempts

Indicates the major or minor segment of the program and defines a path of study for a program attempt. For example, in a Bachelor of Science in Physics program, the major could be Thermodynamics and the minor, Particle Physics.

Unit Set Category

Institution-defined grouping of unit sets, or code representing this grouping, including MAJOR, MINOR, STRAND, and STREAM.

Unit Set Code

Identifies a unit set.

Unit Set Group

Subdivision of a program award. Allows a program award to be split across ceremonies and graduands to be presented in order within their unit set group.

Unit Set Status

Institution-defined status attributed to a unit version to define its currency in the system, and mapped to a system unit set status.

Unit Set Trigger

Unit set code indicating that students in that unit set are to be assessed a fee.

Unit Set Version

Only one version of a unit set with a status of ACTIVE and an unset expiry date can exist in the system.

Unit Set Version Number

Identifies a version of a unit set.

Unit Status

Indicates the level of activity of a unit, for example, CURRENT and SUSPENDED.

unmet need

Due to budget constraints, the administrator cannot always provide funds to meet the student's need. The difference between the need and the awarded amount is known as the unmet need. See *need*.

unsubsidized loan

Interest is not paid by the government on unsubsidized loans. The borrower is responsible for the interest on an unsubsidized loan from the date the loan is disbursed, even while the student is in attendance. Students can avoid paying interest while in school by capitalizing the interest resulting in a higher loan amount. Unsubsidized loans are not need-based and can be used to replace the family contribution. See *Stafford loans* and *subsidized loan*.

unmet need

Due to budget constraints, the financial aid officer can provide the student with less than the student's need. This gap is known as the unmet need. See *need*.

unsubsidized loan

Interest is not paid by the government on unsubsidized loans. The borrower is responsible for interest on an unsubsidized loan from the date the loan is disbursed, even while the student is in school. Students can avoid paying interest while they are in school by capitalizing the interest that increases the loan amount. Unsubsidized loans are not based on financial need and can be used to finance the family contribution. See *Stafford loans* and *subsidized loan*.

Unit Trigger

Unit code indicating that students in that unit are to be assessed a fee.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

unit version reference

Identifies the unit version to which a correspondence item is related.

unsecured loan

Loan not backed by collateral, representing a greater risk to the lender. The lender can require a cosigner on the loan to reduce risk. If a borrower defaults on the loan, the cosigner is held responsible for repayment. Most educational loans are unsecured loans. In the case of federal student loans, the federal government guarantees repayment of the loans.

Unsuccessful Applicant

Applicant who has met the requirements for admission but is not offered admission because of quota restrictions or other reasons.

untaxed income

Contributions to IRAs, Keoghs, tax-sheltered annuities, and 401k plans, as well as worker's compensation and welfare benefits.

Upfront Payment Option

See *government contribution payment option*.

Upper Load Limit

Upper load value of the enrollment load range, in credit points, that defines a student's attendance type in an academic period.

Upper Range

See *element range*.

U.S. Department of Education

Government agency administering several federal student financial aid programs, including federal Pell Grants, federal work study programs, federal Perkins loans, federal Stafford loans, and federal PLUS loans.

U.S. Department of Health and Human Services

Government agency administering health education loan programs, including the Health Profession Student Loan and Nursing Student Loan programs.

USED

See *U.S. Department of Education*.

Variation Cut-Off Date

Date when variations to enrollments can no longer be processed, except for users with a security role permitting access to the variation cut-off date override enrollment step.

variation cutoff date

Date after which changes to enrollments can no longer be processed, except for users with a security role permitting access to the variation cut-off date override enrollment step.

variation cutoff date alias

Applies to assessment items. Used to warn against further variations in the unit assessment item in a teaching period.

variable interest

Interest rate that changes periodically.

venue

Place available for an examination session or site where a graduation ceremony takes place.

verification

A review process during which the financial aid office determines the accuracy of information provided on the financial aid applications. Students and parents are required to submit supporting documentation when requested. If discrepancies are uncovered during verification, a student's final financial aid package can vary from the initial offer. If a student refuses to submit the required documentation, the financial aid package is cancelled and no aid is awarded.

veteran

For federal financial aid purposes, such as determining dependency status, a veteran is a former member of the U.S. Armed Forces, for example, Army, Navy, Air Force, Marines, or Coast Guard, who served on active duty and was discharged dishonorably, that is received an honorable or medical discharge. A person is a veteran even if they serve one day on active duty and that does not include active duty for training, before receiving DD-214 and formal discharge papers. ROTC students, members of the National Guard, and most reservists are not considered veterans. Having a DD-214 does not necessarily mean that a student is a veteran for financial aid purposes.

Version Number - Grading Schema

System-generated number that identifies a version of grading schema.

Visa Type

Classification of visas for international applicants, students, staff, and faculty.

Voice Response Available Indicator

Specifies that a unit offering option is available for enrollment through voice response.

Voluntary End Indicator

Describes whether the ending of a unit set attempt is voluntary or the result of failure to progress or other administrative reason.

Voluntary Indicator - Intermission

Indicates if an intermission of a student program attempt is initiated at a student's request.

W2 form

Form listing an employee's wages and taxes withheld. Employers are required by the IRS to issue a W2 form for each employee before February 28.

waitlist

Adding students to a list, if enrollment in a unit section is full, and enrolling students later if a vacancy arises or if there is an increase in class size.

work study

A need-based financial aid program that helps students to obtain employment. See *federal work study* and *institutional work study*.

Waive Option Check Indicator

Indicates whether to waive checks applied by forced elements of a program offering option, including location, attendance mode, and attendance type.

Waive Rules

Turning off online unit rule checking function, allowing a student to enroll in a unit that goes against the rules.

Waive Rules Date

Date when a rule applying to a unit attempt is waived.

Waive Rules Person ID

Indicates a person who waives a rule applying to a unit attempt.

weighted average mark

A student's average percentage mark used to evaluate progress in a program attempt.

weighted average mark weighting

Rules used to determine weighted average mark calculations.

Weighted Effective Full Time Student Units

Effective Full Time Student Units multiplied by discipline funding index multiplied by unit program level factor.

Weighted Effective Full Time Student Units Factor

Factor associated with an internal program level grouping used to determine weighted effective Full Time student units.

Working Time

Amount of time a student has to complete an examination.

Workload Credit Points - Lab

Institutionally-defined instructional load calculation equivalent to the lab credit points.

Workload Credit Points - Lecture

Institutionally-defined instructional load calculation equivalent to the lecture credit points.

Write Off Bad Debt Indicator

Indicates if debt is written off when a fee encumbrance is applied.

Year - Program Annual Load

Year to which an annual load figure applies.

year of program

Functionality that allows pre-enrolling students to unit sections based on their year of study in the program attempt. This functionality also enables advancing a student's year to the subsequent year based on progression results.

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