

Student Information Systems



Curriculum Module



Procedure Manual



South Dakota Colleague System Procedures

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Revisions with this update:

In Making an Instructional Assignment

- Each section must have only one instructional method as approved by AAC for your university. If there are multiple instructional methods, the one(s) in error should be removed.

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Preface

South Dakota Colleague System Procedures

Colleague System Instructions

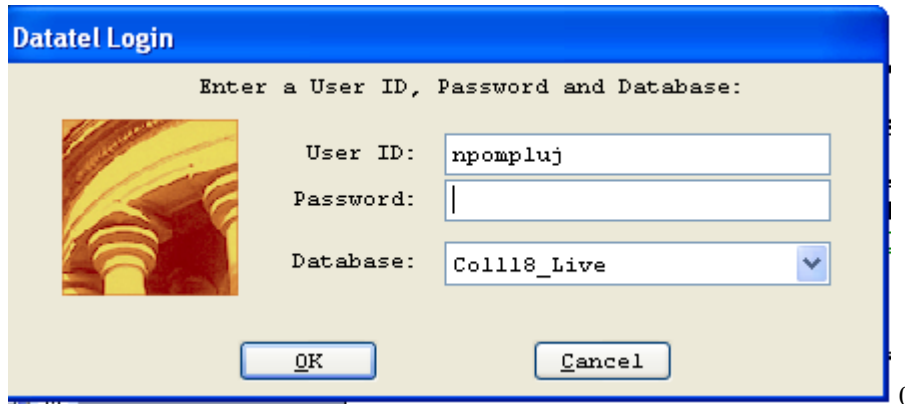
Responsibility: University

Colleague Access

Accessing Colleague from Windows

- Select the **START** button on the taskbar.
 - Select **PROGRAMS** from the start menu.
 - Select **DATATEL** from the **PROGRAMS** options.
 - Select **UI Desktop** from the **DATATEL** options.
- or
- Select the desktop **Datatel** icon.

A wIntegrate screen will display briefly followed by the Colleague Logon screen as shown below.



Logging On/Off & Changing Password

- Enter your Colleague ID in lower case letters at the login prompt and press enter.
- Enter the password at the password prompt. See the Rules for Password section of the document for changing passwords.

If either the login ID or login password is entered incorrectly, the login prompt will re-display. After 3 unsuccessful tries, the login ID will be locked and must be reset. Send an email to **your university system administrator**.

Select Coll18_Live for the Production Account or Coll18_Test for the Test Account.

Click on OK.

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Change Password

- Select the **START** button on the taskbar.
 - Select **PROGRAMS** from the start menu.
 - Select **DATATEL** from the **PROGRAMS** options.
 - Select **DATATEL Terminal** from the **COMMUNICATIONS** options.
- or
- Select the desktop **Datatel Terminal** icon.

The following screen will be displayed for the change of password.

<p>Main Menu</p> <ol style="list-style-type: none">1. Live Account2. Change Password3. Log Off <p>Enter your selection[1-10]: 2</p> <p>Changing password for "userid"</p> <p>userid's Old password:</p> <p>userid's New password:</p> <p>Enter the new password again:</p>
--

- Enter userid's old password
- Enter userid's new password
- Re-enter userid's new password

A message will display confirming that the password has been changed.

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Rules for passwords are:

- a) The password must be a minimum of six characters long.
- b) The password must contain two characters and two numbers.
- c) The password must have two alpha/numeric characters not in the previous password.
- d) The password can not have more than two repeating characters.
- e) The password only recognizes the first eight characters, but a password can contain 256 characters.
- f) Passwords can not contain these characters: () * ? < > / ; & ! [] { } | \$ \ ' ")
- g) The password is case sensitive.

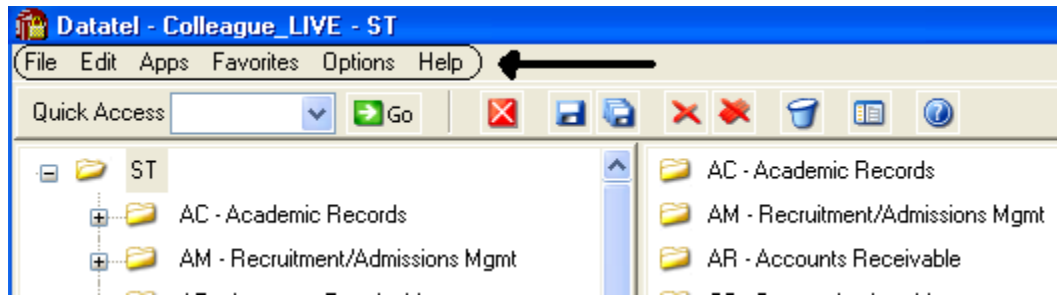
Password Change Requirements

- a) Users will be required to change password every 20 weeks. After the 18th week, users will be notified that their password will need to be changed soon. They will then have those two weeks plus an additional two weeks grace period to make that change. Total time lapse for a password is 20 weeks.
- b) The account will be locked if no change is made to a password after the grace period. To reset the account, send an email to **your university system administrator**.
- c) When a user is requested to change password upon login to Colleague, they **MUST** do so. Failure to comply will result in being locked out of the system after the fifth try. However, while trying to change password, the user is given several tries to meet the password criteria until they are successful. If the user gets locked out, send an email to **your university system administrator** to have the ID reset.
- d) When a user receives the message to change their password, they will have 60 seconds to begin typing before they are disconnected – but not locked out.
- e) Passwords cannot be reused immediately. There is a 26-week wait period before a password can be recycled. Even then, the password cannot have been used within the last two iterations.

If you are successful logging in, you will get the message screen with the “PRESS ENTER TO CONTINUE” message at the bottom. A small ‘loading’ message will flash on the screen before you get the ‘Datatel – Colleague’ screen.

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Options on the very top row:



To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

To change the application, click on **Apps**, check the application wanted: ST is the student application and most users will not need to use another application.

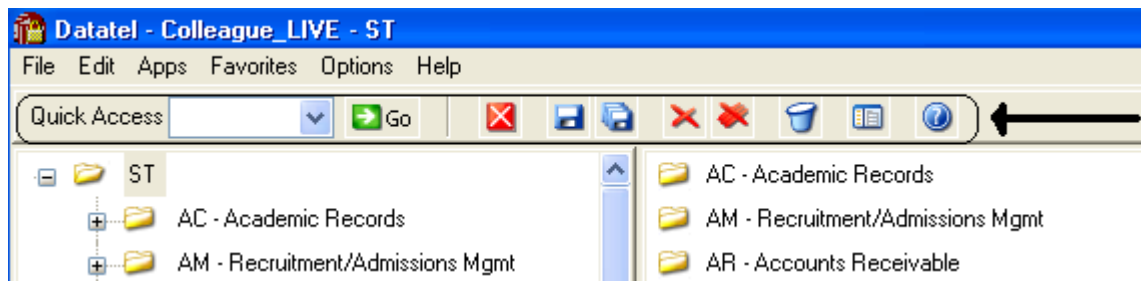
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

To change the font or colors on your screens/reports, click on **Options**, then **Font** or **Change Colors**.

To be able to scroll back to see output on the screen from paragraphs run from a user menu (to see list of menus, click on NCCR, then XNSU), click on **Options**, then **Show UI Console**. A Datatel UI Console window will appear on the screen. Enter the menu name on the Datatel-Colleague main screen. Answers to the prompts can be entered on Datatel – Colleague main screen or in the Send to Host box at the bottom of the Show UI Console window. To view output on the screen, use the scroll up or down buttons at the right on the Show UI Console window.

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Options on the Second Row:



If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go**. The drop down box in the Quick Access box will contain the mnemonics you have used previously.

If you are updating records and have not detailed to another screen, click on the **Single Disk** (or pressing F10) to update the current screen and retain the same screen to select a new record. If you have detailed to another screen, click on the **Single Disk** (press F10) to update the current screen and return to the screen from which you detailed. If you have detailed down to additional screens and wish to update all the fields that you have changed on all the screens and return to the menu, click on the **Multiple Disks**.

If you have looked at a screen without detailing down and do not want to make any updates but want to look at other records on the same screen, click on the **Red Diagonal with a Single Cross Diagonal** (or pressing F8). If you have detailed down and you do not wish to update the fields on the current screen (and any screens you detailed from to get to the current screen) and return to the menu, click on the **Red Diagonal with a Multiple Cross Diagonals**. **Warning**. If you click the Red multiple Cross Diagonals, none of the changes you made on any screen you detailed from will be saved.

Wastebasket (Shift-F10) is for deleting entire records. Clicking on the **Menu** when on a screen turns on (off) the menu display on left side of screen. To see the Field Help for the field where the cursor is, click the **Blue Circle with a ? (F1)** inside.

Menu



To expand the menu on the left side of the screen to see submenu(s), click on the Plus sign (+). To remove submenus, click the Minus sign (-).

To access a screen without typing the mnemonic, click on a screen name that does not have a plus (+) or a minus (-) in front.

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To see a list of screens that you have added to **Favorites** (see above), expand the Favorites Menu by clicking on the Plus sign in front of Favorites. This will enable you to display a customized menu of screen names.

Detail Screens

Screen mnemonics display at the top of left hand corner. To move to a new field, use the mouse to point and click on the new field.

Multiple value fields will have a box with a number at the left of the data.

A box with bright colors to the right of the data indicate that you can drill down to a detail screen by clicking on the box or by pressing F2. Do not drill down from a Comment screen. If, however, you drill down from a Comment screen, you will be taken to an editor. To return to the Comment screen, enter 'fi' at the bottom.

The names of the screens that you have drilled through will display at the top. You can look at one of those screens by clicking on it; however, you will not be able to update it unless you cancel (clicking on the single red X box in the 2nd top row or pressing F2) or finish out (clicking on single black X box in the 2nd top row or pressing F9) of the screens that you detailed to.

Fields with a box at the right with a 'V' have Validation Codes associated with the field. To see a list of valid codes, click on the box. To select a value, click on the item in the list.

If you enter 3 dots (...) in a field that has table values associated, the table will be displayed. To select a value, type in the number associated with the list and press enter OR check the box (or boxes to populate multiple values in a multiple valued field) to the left of the number and click on the disk at the bottom of the screen.

Fields with 2 small rectangles with an up arrow in the top rectangle and a down arrow in the bottom rectangle allow you to scroll through the fields by clicking on the up or down arrow. Right click on the up or down arrow for a drop down box allowing you to select from a list of options.

Fields with a box with a calendar are date fields. You can select a date from a calendar by clicking of the box and clicking on a day on the calendar. When the calendar is displayed, you can change the month by clicking the single 'less than (<)' or 'greater than (>)' symbol; to change the year, click the double less than (<<) or greater than (>>) symbols.

To copy the value in a field highlight the field, press Ctrl C; to paste that value in another field, highlight the new field and press Ctrl V. Alternatively, highlight value to copy, click Edit, click Copy, highlight the new field, click Edit, click Paste.

Date and Time Stamp

Put the cursor is in the Comment field, click on Edit, then click on Date/Time/Login Stamp

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To view a report

Output from processes (ie EVAL) or reports on UTFB will be displayed in a report browser. To scroll through the current page, use the scroll bar at the right side. To go to a new page, press the Left or Right Arrow (Page Down, Page UP). The rightmost Printer is used to print to a printer that has been defined to Colleague.

Function keys

F1 → Field Help provides on-line short help specific to the field in which the cursor is positioned.

F1 Enter → Field Help provides a longer on-line, detailed help messages specific to the field in which the cursor is positioned

Shift F1 → Process HELP gives an overview of a process, explaining its basic function and its relation to other processes

F2 → DETAIL moves to different screens and is used when there is box to the right of the screen indicating that drill down screen(s) are available.

Shift F2 → Funct HELP (Fkey HELP) displays the layout of function key assignments for keyboard.

Shift F8 → Direct Acc cancels the updates made on the screen and returns to the previous screen

F9 → FINISH saves new data entered and takes you back to the previous screen or menu

Shift F9 →FINISH same as F9

QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel from a screen you are not updating. Caution: Changes made on a drill down screen will not be saved when you cancel from the current screen.

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Search Procedures

Student searches may be completed in several ways:

- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

Student Social Security Number Search

- ◆ To begin a record search, first use the social security number if available. Check the name and birth date to confirm a match of the record for which you are searching.

Student Colleague ID Search

- ◆ Colleague ID, a 7 digit unique ID assigned by Colleague, can also be used for a person search. Again, check the name and birth date to confirm a match of the record for which you are searching

Name Search

Name searches will display a resolution screen listing all people meeting the name search criteria. Select the desired record by using the sequence number.

Exact Name Search

A name search can be done in three ways: “First Name” (space) “Last Name”; “Last Name”, “First Name”; or “Last Name” only. It is also permissible to use only part of the first or last name for a broader name search. ** You must use a minimum of three characters when doing a partial name search.

When searching for a name with spaces, use the underscore key “_” to identify the position(s) in the name where the spaces are located. Example: Terrance Van Den Hemmel would be searched for by entering “Terrence Van_Den_Hemmel” or “Van_Den_Hemmel, Terrance”.

When searching for a name with an apostrophe or a hyphen, leave the apostrophe or the hyphen in the name search. Example: Bruce O’Neil would be searched for by entering “Bruce O’Neil” or “O’Neil, Bruce”, Marge Wilson-Hart would be searched for by entering “Marge Wilson-Hart” or “Wilson-Hart, Marge”. The name search will also find Marge by using either part of her hyphenated last name. Example: “Wilson, Marge” or “Hart, Marge”.

Phonetic Name Search

If social security number search and name search (full and partial) fail to yield a result, use the soundex option. This option will search for a last name by “the way it sounds”. At the lookup prompt, type in “/” before typing in the phonetic spelling of the last name. This does a broad search by the sound of the last name, but it is not as reliable as the other search options.

The name search will search records based on the “Name LFM” and “Other LFM” fields. The name search will not search records based on the “Pref Name” or “Mail Name” fields. All possible record matches are displayed on the “person resolution” screen by preferred name.

When a list of possible records is found on the “person resolution” screen, check the social security number, birth date, entry date, and address to confirm a match of the record for which you are searching.

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Other Searches

Course or Section Search

Enter XXXX-000-00

Where: XXXX is the prefix for the course (i.e.: BIOL)

000 is the course number (i.e: 101)

00 is the section number with the university identifier(i.e.:x 01)

Example: BIOL-101-D01

If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

Term Search

Enter YYYYTT (i.e.: 1998FA)

Where: YYYY is the year in which the term actually occurs (i.e.: 1998)

TT is the term

(i.e. FA = Fall , SP = Spring, SU = Summer)

Restricted lookup by Topic Code

- At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
- At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria
 - For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

Restricted lookup for open sections

Search for open sections by entering S at the section resolution screen from RGN, then type WITH SEC.AVAIL.STATUS EQ 'Open' and return.

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Record Search Overview

Responsibility: University

LookUp Selection Options

The LookUp Processor gives you full query-language selection capabilities along with full data field and record security. Many of the selection options available with LookUp are similar to using database management query language and retrieval. See your system administrator if you need assistance using any of these options.

You may enter one of the following at the LookUp prompt:

- * the actual ID
- * [**@**] to display the last record filed
- * [...] to view all IDs you may access
- * [**ABC...**] to select all IDs that begin with ABC
- * [**...ABC**] to select all IDs that end with ABC
- * [**...ABC...**] to select all IDs that contain the characters ABC
- * [**ABC...XYZ**] to select all IDs that begin with ABC and end with XYZ
- * [**;**] to display all available dictionary elements for this file
- * [**;**]dictname to 1) Select all IDs with a value for this dictionary element or 2) If dictname is an indexed field, to display a resolution screen showing all the values indexed for this dictname. For example, you might enter ";SCHOOLS.DEPTS" at the Schools LookUp prompt to find all the schools in your institution associated with one or more departments.
- * [**;**]dictname datavalue to select all IDs with a value like the datavalue for this dictionary element. For example, you might enter ";SCHOOLS.DEPTS MATH" at the Schools LookUp prompt to find all the schools in your institution associated with the math department.
- * [**;**]dictname operand datavalue to select all IDs whose value of dictname matches the operand and datavalue(s). A datavalue may be any string containing alphanumeric characters or ellipsis (...). For example, you might enter ";SCHOOLS.DEPTS NE MATH" at the Schools LookUp prompt to find all the schools in your institution not associated with the math department.

Valid operands are:

- * [**=**] or [**EQ**] (Equal)
- * [**<>**] or [**NE**] (NOT Equal)
- * [**>**] or [**GT**] (Greater Than)
- * [**>=**] or [**GE**] (Greater or Equal)
- * [**<**] or [**LT**] (Less Than)
- * [**<=**] or [**LE**] (Less or Equal)
- * [**MATCHES**]
- * [**LIKE**]
- * [**UNLIKE**]

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Record Lookup

There are various types of records created in Colleague. Person or Organization records, records for courses and course sections, academic credentials, positions, benefits, general ledger accounts, and purchase orders are just a few of the types of records created throughout Colleague. Generally speaking, once these records are created, information pertaining to them can be changed or deleted but the actual person or organization record will always remain. For example if you create a course record for ENGL-1234, once saved, you can change the credits, academic level, title, CIP codes, etc., but you can't change the name to ENGL-2345. Similarly, if you create a person record for Bob Smith and save the record you can later change his address, phone number, birth date or even his social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

Person/Organization Lookup

The person/organization record is the more difficult record to find since you are relying on two variables. First is that the person providing the information was honest in presenting the demographic facts and secondly that the data entry person was accurate in entering in data. On occasion, you will find that people provide incorrect information or even falsify data. This is commonly seen when people can't quite remember their social security number so they provide one that is close. Secondly, data entry staff are only human so honest mistakes do occur when they try to read scribbled handwriting on a form. Regardless of how inaccurate data got into the system, front-end staff must carefully check for those eventualities before adding new records.

The following step-by-step process is for looking up records as well as an explanation of the reason for the process:

1. **Enter first two letters of first name and first three letters of the last name** - (You can also enter Smi, J and Colleague uses the comma to designate last, first). Although this option will bring more records than spelling the entire name out, it helps locate records with incorrect or slightly different spellings. If you chose to enter the entire name you would certainly get a smaller group of records to look through but you also have a greater chance of missing duplicates.

IF YOU HAVE NO MATCH:

2. **Enter the Social Security Number** - Although you may not see the need to use this option after a name lookup does not pull a match, some students may have been using the wrong number or you may find a conflict with the number. Since the social security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

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IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

3. **Try a Soundex lookup-** in some situations you may encounter names that have several common spellings or that you have difficulty in determining proper spelling. By using a Soundex lookup you will find occurrences that don't match the spelling but sound like the name you are searching for. To look a name up using Soundex, at the Person Look Up type: /erdlika, ray (actual name searching for is: Hrdlicka, Raymond).

Use the data elements on the resolution screen to verify that the right person is selected. Also check to see if two records look similar. Remember that the system will allow entry of the same person twice (except for the social security number). If the birth date and the address are the same, it may indicate that there is a duplicate. If the record is truly a duplicate, follow the procedure in the final section of this document to consolidate the record into one.

**** POINTS TO REMEMBER ****

- 1) If the person whose name is being entered goes by another name or a nickname, that person's name may not be found unless the other name has been entered on NAE as an "Other Name" or a nickname has been entered on the BIO (Biographic Information) screen. It is really a judgment call when entering a person's name and deciding whether or not that name is the person's legal or other name. However, the Human Resources/Payroll office will have the legal names of employees.

EXAMPLE: The end-user has an application to enter and they are using the APPN screen. The name on the application is Jimmy Stern. James Stern was entered previously as a prospect on the XPRS screen. The end-user enters Jimmy Stern at the Person Lookup and the record is not found. They also do a partial name lookup of Ji St and the record is not found. Using the first initial of "J" would have found the name James Stern.

EXAMPLE: Buck Stern was entered on the XPRS screen as that is the name he had put on a Prospect card from a High School Fair. His application is now in the Admissions office with James R. Stern entered on the application. James R. Stern would not be found in a Person Lookup as Buck Stern had been entered as a prospect. An alternate lookup would be to type the last name "Stern" only.

- 2) The "Preferred Name" field is a default from the entry in the "Last", "First", "Middle" field at the top of the NAE screen. If one name only is entered in the "Preferred Name" field then LookUp for that person would be the first name only. For example: Rachel Briggs goes by "Sammy" Briggs. Sammy only is entered in the "Preferred Name" field. A data entry person goes to look up Sammy Briggs and that name is not found.

RECOMMENDATION: Leave the "Preferred Name" as it appears after entry in the Last, First, Middle fields and enter the other name in the

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“Nickname” field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

Other Records Lookup

Since there are fewer opportunities for spelling errors and the format for naming is usually very structured, other record lookups tend to be more straightforward. However just as with person records, it is important to follow consistent steps when searching before adding records. Following is a step-by-step process for looking up records:

1. **Enter a partial lookup** - Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).
2. **Use (...) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using ... For example, looking up a GL number with the numbers “1150” in the middle you can type ...1150... at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing ... at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type ...ADJ or searching for all departments that begin like EN you would type EN...

Individual and Corporation Record Relationship

****CAUTION****

In Colleague, the system maintains a **unique distinction for individuals and corporations**. When you enter a person on NAE, APPN, FCTY or FACL, the system creates a record in the PERSON file. Likewise, when an organization is created on ORGP, a record is created in the CORP.FOUNDS file. The concern arises when lookups are done on a screen earmarked for the other (calling up University of Sioux Falls on NAE or Mary Smith on ORGP). Colleague gives you a message similar to the one below. If you save out the screen, the record will be moved to the other ‘domain’. In other words, an organization record could be converted to a PERSON record or a PERSON record could be converted to a CORP.FOUNDS record.

If you have update access to the screen and receive a ‘Warning! This record will be marked as a person if updated’ message, you must:

- Click OK to release the warning message.
- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.

South Dakota Colleague System Procedures

- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

If you accidentally make the change you can return the record to the correct domain by calling up the record on the appropriate screen.

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Flagging records on a resolution screen

For ease in data entry, Colleague allows you to flag either all records on a resolution screen or certain records on a resolution screen. To flag certain records, enter F on the resolution screen, then enter the number of the item you wish to flag. To flag all records, enter F ALL on the resolution screen. Notice all records have an asterisk next to them. You can do a sort/select option before the F ALL to narrow the resolution screen down.

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Using a savedlist to process large numbers of records

- At the person lookup prompt, enter @SELECT
- The Primary Selection Criteria (PSC) screen is displayed
 - Enter the savelist list name
- Update to process the records
 - Enter @@ or \$ at the LookUp prompt to retrieve/view the first selected record, etc
- To deactivate your list, enter @SELECT at the LookUp prompt
 - Save or clear the list

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PROGRAMS

South Dakota Colleague System Procedures

Defining Academic Program Admit Rules

Responsibility: University

Note: Before you define academic program admit rules, the appropriate office at your institution must define the academic programs you are defining rules for. See *Using Curriculum Management* for details.

Complete the following procedure to define your academic program admit rules.

Step 1 - Define your application status codes.

- See “Application Statuses”
- These are defined centrally.

Step 2 - Map out your rules in English-like statements.

Step 3 - Identify the data elements you need to construct the rules.

Note: The data elements you use must be from the PERSON or APPLICATIONS file, or one of the subsidiary files associated with these. See “Understanding the Rules Processor” for more information about primary views.

Step 4 - Map out your rules using the Rule Processor syntax.

Step 5 - Go to the Academic Program Admit Rules (ADMR) screen.

- At the Academic Program LookUp, enter the program or x... (where x is the university) for a listing

Step 6 - Enter the name of an academic program admit rule.

Note: Naming convention is university or common -> module -> name.

- The Record not found--Enter (A)dd or RETURN to Reenter prompt is displayed.
- If the rule displays on the ADMR screen and the cursor moves to the Application Status field, continue with step 10.

Step 7 - Enter A.

- The Rules Definition (RLDE) screen is displayed.

Step 8 - Enter the rule.

- Refer to “Understanding the Rules Processor” for information about the Rules Definition screen.

Step 9 - Save the rule.

- The ADMR screen redisplay with the cursor in the Application Status field.

Step 10 - Enter the application status code associated with this rule.

South Dakota Colleague System Procedures

Step 11 - Repeat this procedure, beginning with step 6, for each academic program admit rule.

Step 12 - Save the academic program admit rules on the ADMR screen.

South Dakota Colleague System Procedures

Defining Academic Program Graduate Honors Rules

Responsibility: DA Group

Before you define academic program graduate honors rules, the appropriate offices at your institution must define the academic programs for which you are defining rules. See *Using Curriculum Management* for more information about defining your academic programs.

Complete the following procedure to define your academic program graduate honors rules.

Step 1 - Define your graduate honors codes.

- See “Honors Codes”.

Step 2 - Map out your rules in English-like statements.

Step 3 - Identify the data elements you need to construct the rules.

Note: The data elements you use must be from the STUDENT.ACAD.LEVELS file, or one of the subsidiary files associated with it.

- See “Understanding the Rules Processor” for more information about primary views.

Step 4 - Map out your rules using the Rule Processor syntax.

Step 5 - Go to the Graduate Honor Rules (GHRL) screen.

- The cursor is at the Academic Program LookUp prompt.

Step 6 - Enter the academic program for which you want to define graduate honor rules.

- Colleague displays the academic program in the header and the cursor moves to the first line of the Graduate Honor Rule group.

Step 7 - Enter the name of the graduate honors rule.

Note: Naming convention is university or common -> module -> name.

- The Record not found--Enter (A)dd or RETURN to Reenter prompt is displayed.
- If the rule displays on the GHRL screen and the cursor moves to the Graduate Honor field, continue with step 11.

Step 8 - Enter A.

- The Rules Definition (RLDE) screen is displayed.

Step 9 - Enter the rule.

- Refer to “Understanding the Rules Processor” for information about the Rules Definition screen.

Step 10 - Save the rule.

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- The GHRL screen redisplay with the cursor in the Graduate Honor field.

Step 11 - Enter the honors code Colleague assigns when this rule is true.

- The cursor moves to the next line of the Rules group.

Step 12 - Repeat this procedure, beginning with step 7, for each graduate honors rule for this academic level.

Step 13 - Save the graduate honors rules record.

South Dakota Colleague System Procedures

Revised 2/6/04

Adding a Catalog on the PROG Screen

Responsibility: Central

You can add a catalog to the list of catalogs on the PROG screen, then detail to the APRS screen to define requirements for the new program/catalog combination. Since PROG is secure in the merged environment, APRS will need to be accessed directly from the menu.

Note: If you use this method, you will need to enter all of the program requirements at the keyboard. This method is appropriate if the requirements for this version of the program are not similar to those for any existing versions. In most cases, however, you will probably want to make a new version of the program, which is similar to an existing version. In that case, you should create the new version by copying the program from one catalog to another, as discussed in “Copying an Individual Program from One Catalog to Another”.

To create a new version of a program by adding a catalog on the PROG screen:

Step 1 - On the Academic Programs (PROG) screen, access the existing program.

Step 2 - In the Catalogs field, move to a blank window.

Step 3 - At the Catalog LookUp prompt, enter the name of the catalog to which you want to add this program.

Step 4 - Detail from the Addnl Info field to the Academic Program Requirements (APRS) screen.

Step 5 - Select the new catalog from the list of catalogs associated with the program.

Step 6 - On the APRS screen, define requirements for the program/catalog combination.

- Most of the fields on the APRS screen apply only to the program version associated with one catalog. Three fields, however, affect the basic program characteristics that apply to all versions of a program, for all associated catalogs. Those three fields are Grade Scheme, Transcript Grouping, and Student Selectable. When you enter values in the Grade Scheme and Transcript Grouping fields on APRS, it has the same effect as entering values in the Grade Scheme and Tran Group fields on the Academic Programs (PROG) screen.

Step 7 – Update the APRS -> PROG screens

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Central Maintenance of the Master Program Database

Responsibility: Central

Timeframe: Ongoing

The following forms, after they have been approved, will be forwarded (via mail or email) by the designated University Contact to the STUDENT Policy & Operations Administrator for central processing:

Request For An Emphasis in an Existing Major

Existing Program: Minor Program Modifications – These are relative to the university's degree audit and do not require central program maintenance. They do not need to be sent forward. If there are courses that are to be added or deleted to the Master Course Database, the appropriate Course forms should be used.

Note: All changes to courses in the System General Education Requirements must be reviewed by AAC, COPS, and the BOR.

The following forms, after they have been approved by the BOR, will be forwarded (via mail or email) by the BOR Office to the STUDENT Policy & Operations Administrator for central processing:

New Undergraduate Degree Program Request

New Baccalaureate Degree Minor

New Graduate Degree Program

New Site: Request to Offer an Existing Degree Program – No entries are made in the Master Program Database.

Program Placement on Inactive Status or Termination

Existing Program: Substantive Program Modifications.

Tables (PROG, CERT, MINR, MAJR, SPEC, DEGR, CATC, APCO) and valcodes, which relate to Programs, will be maintained centrally.

Universities will be informed via email of additions, changes, and deletions that have been processed.

Updates to the data base will be made through the combined effort of the STUDENT Policy & Operations Administrator, the System Data Administrator, and the Web Administrator.

Creating Programs from Scratch**Responsibility: Central**

The Academic Programs (PROG) screen is used to create a program from scratch.

Effective Spring 2005 program codes will be built according to the naming convention below, which includes degree, major, and specialization. Because minors can be shared between universities, they will no longer be set up as separate program codes. To permit the use of degree audit to verify minor completion, all minor requirements must be written as separate degree audit requirements. This will allow the minor requirement to be attached to an individual student.

PROG naming convention:**Univ.****Degree**

Division. (Should only be included for those majors in the same degree offered in two different divisions with different degree audit requirements). An example of this would be a BS degree in Arts and Science in Biology and a BS degree in Biological Sciences in Biology.

**Major with a “-“between the major and specialization
Specialization**

Examples:

S.BSA&S.BIOL-MOBI when the major can be granted in two different
 Divisions

Note: there is no “.” entered between Degree and Division

U. BA.ENGL-CWRT when the major can be granted in only one division

Articulation PROG naming convention:**Univ.****Degree.**

Division. (Should only be included for those majors in the same degree offered in two different divisions with different degree audit requirements). An example of this would be a BS degree in Arts and Science in Biology and a BS degree in Biological Sciences in Biology.

Major-

Ax (where x is the first initial of the Vocational Technical Institute with whom the agreement exists – L for LATI, W for WDTI, M for MTI and S for STI).

For example - B.BS.BADM-MT-AL.

Note: The major or specialization portions of the code may need to be shortened to remain within the 15 character limitation for the Program code.

South Dakota Colleague System Procedures

Certificate PROG naming convention:

Univ.

Degree.

CERTU – undergraduate certificate, not eligible for financial aid

CERTUF – undergraduate certificate, eligible for financial aid

CERTG – graduate certificate, not eligible for financial aid

CERTGF – graduate certificate, eligible for financial aid

Major

Note:

- Only degrees, majors, and specializations that have been approved by the Board of Regents will be entered in the PROG coding.
- Universities may choose not to enter specializations into the PROG code and enter them on STPA as additional specializations.

Step 1 – Access the Academic Programs (PROG) screen

Step 2 - At the Acad Program LookUp prompt, enter a name for your program

- Colleague will prompt you to “Add” in order to create the program.
- Use a school identifier for your institution in the first character of the program name

Note: If the name you select for your new program matches the name of an existing program, the existing program will come up on the PROG screen. CANCEL from the screen and pick a new name for your program.

Note: Majors, minors and specializations must be smart-coded because there is only one division and one active flag tied to a major on the MAJR table. The program (PROG) names will be smart-coded by institution (e.g. S.BS.MATH) but the major code will not need to be smart-coded within the program name. The Major Field within the PROG screen will need to be changed to the smart-coded major (e.g. SMATH). Smart-coded majors will allow the system to use pre-processing to get major to map to the correct university program.

Step 3 – Enter the Title of the program

- Enter the degree initials, major and associated specializations if applicable
- For example, BS in Criminal Justice Studies\Law Enforcement

Step 4 – Enter the Status, Approval Agency/Person, & Approval Date

- Enter the status of Active
- Enter the Board of Regents as approval agency
- Enter the date the program was approved by the BOR
- Colleague maintains a history of the status of the program. You can detail to the Acad Program Status History (PRST) screen to view and modify the course’s historical status changes

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Step 5 – Enter the smart coded Department

- The Division, School, Academic Level and Grade Scheme default in

Step 6 – Enter the catalogs associated with the program

Step 7 – Enter the Start Date the program becomes effective

Step 8 – Enter the Degree or CCDs

- At least one of these fields is required if the Allow Grad field is set to “Yes” (the default)

Step 9 – Enter the smart coded Majors, Minors, Specs

- Enter the approved majors and specializations
- In order for specializations to be added on PROG they must be reflected in the Program Title and degree audit requirements must be written.
- If they are not reflected in the Program, they must be added to the student’s program on STPA.

Step 10 – Review the Academic Level and Associated Grade Scheme

- UG for undergrad, GR for graduate, MD for medical or LA for law

Step 11 – Enter the National ID (CIP Code) as approved

- The National ID defaults from the major.

Step 12 – Enter the Location the program is offered at

- Enter your university abbreviation

Note: Location (university) will be populated on existing programs during the merge in the Locations field on PROG.

Step 13 – Enter the Tran Group

- The transcript grouping for a program determines which courses may be counted toward this program. This transcript grouping is also a default for printing transcripts.
- Enter the transcript grouping associated with this program for this location
 - The transcript groupings contain the pre-merge and post-merge credit types – For undergraduate programs the transcript grouping would be SUG, BUG, NUG, MUG, UUG, and DUG. For graduate programs the transcript grouping would be SGR, BGR, NGR, MGR, UGR, and DGR.

Step 14 – Enter the Types

- Enter the degree type
- For example, BA, BS, AA, MS, etc

Step 15 – Enter the Months to Complete

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- This determines the anticipated graduation date for a student
- For a four year degree, use 48 months
- For a two year degree, use 24 months

Step 16 – Enter Allow Grad

- Enter Yes, if this program is a degree seeking program
 - Yes is entered for all board approved certificates
- Enter No, if this program is not a degree seeking program

Step 17 – Enter Create Appl

- Enter No

Step 18 – Update this screen and continue with Additional Information screens

Defining Other Characteristics Which Apply to All Program Versions

Responsibility: Central

From the Addnl Info field on the PROG screen, you can detail to other screens to define other program characteristics. One of those screens is the Academic Program Requirements (APRS) screen (discussed in “Defining Catalog-Specific Program Characteristics”) on which you define requirements which apply to a specific program/catalog combination. The other screens, discussed below, are used to define characteristics which apply to all versions of the program.

Naming convention for rules is university -> module -> name

Academic Program Admit Rules

Currently, SD does not use this

Step 1 – Access the Academic Program Admit Rules (ADMR) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

Step 2 – Define Admit Rules

- Enter the rule defining who may be assigned to the program and the application status

Step 3 – Update the ADMR screen

Graduate Honor Rules

Currently, the system defines this rule on the undergraduate academic level (ACLV) screen.

Step 1 – Access the Graduation Honors Rules (GHRL) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

Step 2 – Define the Graduate Honor Rules and Graduate Honor

- Enter the rule(s) defining any honors associated with the academic program.
- If you do not define graduation honors rules for a program, Colleague will use the graduation honors rules defined for the academic level associated with the program.
- If the academic level does not have graduation honors rules, Colleague will not assign graduation honors to students in the program.

Step 3 – Update the GHRL screen

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Additional Program Restrictions

Step 1 – Access the Program Addnl Restrictions (PRAR) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

Step 2 – Define Program Addnl Restrictions

- You can limit the Certificates, Credentials, and Diplomas (CCDS), majors, minors, and specializations that may be added to the program when it is customized for a student.
- If you do not place restrictions on a program using the PRAR screen, any CCD, major, minor, or specialization may be added to a program to customize the program for a student.
- If you enter XNONE for majors, minors, CCDs and Specializations, additional majors, minors, ccds or specializations for that program will not be allowed (for example, all the 2 year programs should not have additional minors, CCDS or specializations so that no one can give one to a student).
 - X does not stand for the university identifier in this case.
- Entering information here will limit the addition by location also
 - For example, Northern programs associated with appropriate Northern majors, etc

Step 3 – Update the PRAR screen

Acad Program Extl Tran Rules

Currently, SD does not use this.

Step 1 - Access the External Transcript Rules (AETR) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

Step 2 – Define the External Course Rules

- Colleague can evaluate external transcripts when considering an applicant for admission to a program or when calculating a student's GPA for the program. External transcript rules tell Colleague how to interpret the transcript for a program.

Step 3 – Update the AETR screen

Academic Program Contacts

Currently, SD does not use this.

Step 1 - Access the Academic Program Contacts (APCN) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

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Step 2 – Enter the Contact Role and Name/Phone number associated with the contact(s)

- You can identify certain people at your institution as contacts for an academic program.
- The person must already exist in the Colleague PERSON file.

Step 3 – Update the APCN screen

Edit Comments

Step 1 - Access the Edit Comments (UTEC) screen by detailing on the Addnl Info field on PROG

Step 2 – Record Comments about the program

Step 3 – Update the UTEC screen

Additional Acad Program Info

Step 1 - Access the Additional Acad Program Info (APRI) screen by detailing on the Addnl Info field on PROG or accessing directly from the menu

Step 2 - Add additional information to this program such as:

- Honors Code – to designate if this program is an Honors program
- Session Type
- Sessions to Complete
- Admit Capacity – the maximum number of students that can be admitted to this program
- Funding Sources
- Term Length - Enter 15
- Home Language Not Required Reason – Used for SEVIS
 - Enter a reason why mastery of the institution home language is not needed.
 - If this reason is blank, then the student is reported to SEVIS as needing to be proficient in English.

Step 3 – Update the APRI screen

Creating a Program by Copying an Existing Program

Responsibility: Central

Understanding Program Copying

In some cases, you can save time by copying an existing academic program and then modifying the copy. For example, you might want to create a new program which is similar to an existing program. Use the Academic Program Copy (APCO) screen to copy an existing program.

In the “Copy From...” fields, you enter the program/catalog combination you want to copy. Then, in the “To...” fields, you enter the new program/catalog combination you want to create. When you copy a program, the new program inherits the characteristics of the existing program (except for the associated catalogs).

To create a new program by copying an existing program:

Step 1 - Access the Academic Program Copy (APCO) screen.

Step 2 - At the Academic Program Lookup prompt, enter the name of an existing program.

Step 3 - If Colleague displays a list of catalogs, select a catalog to copy from.

- Colleague only displays the list of catalogs if the program is associated with more than one catalog.
- If the program is associated with just one catalog, Colleague automatically enters that catalog in the Copy From Catalog field.

Step 4 - In the To Academic Program field, enter the name of the program which you want to create.

- If the program does not exist, a Record not found, Enter A to Add prompt is displayed. Enter A to add.

Step 5 - In the To Catalog field, enter the name of the catalog to which you want to associate the new program.

- If you skip this field, Colleague automatically copies the catalog from the Copy From Catalog field into the To Catalog field.

Step 6 - Finish from the APCO screen.

- Colleague takes you to the Academic Programs (PROG) screen to define program characteristics.
- See “Defining Program Characteristics”

Copying a Set of Programs from One Catalog to Another

Responsibility: Central

Timeframe: Every Spring for the next year

Use the Catalog Copy (CATC) screen to copy, or “roll,” academic programs from one catalog forward to another catalog.

Note: It is advised that this be accomplished at the end of the spring term each year to activate the program evaluations for the new calendar year.

Step 1 – Access the Catalog Copy (CATC) screen

Step 2 – Enter the From Catalog and the To Catalog including Tracks

- The CATC process does not create a new catalog; the CATC process only copies academic programs from an existing catalog to a new catalog.
- You must create and define the new catalog before beginning this process. Use the Catalogs (CTLG) screen to create and define the new catalog.
- Enter Y to include curriculum tracks

Step 3 – Include or Exclude Programs

- Enter only your university’s smartcoded programs.
- The CATC process updates the new catalog (the catalog you entered in the To Catalog field) with the selected academic programs.
 - You can copy all the academic programs from the catalog entered in the From Catalog field - Limit to your university’s specific programs.
 - or
 - You can limit the copying process by using the Academic Program Incl and Academic Program Excl fields.
 - Identify all programs with the current catalog year to which students should not be allowed to have with the new catalog year.
- The CATC process also copies academic requirements (as entered on the APRS screen). However, it will not overwrite any requirements which have already been specified for the new catalog.

Step 4 – Update the screen

Copying an Individual Program from One Catalog to Another

Responsibility: Central

Use the Academic Program Copy (APCO) screen to copy a program from one catalog to another. All of the characteristics of the existing program, including requirements, are copied to the new version of the program.

To copy an existing program from one catalog to another:

Step 1 - Access the Academic Program Copy (APCO) screen.

Step 2 - At the Academic Program Lookup prompt, enter the name of an existing program.

- **Enter only your university's smartcoded programs.**

Step 3 - If Colleague displays a list of catalogs, select a catalog to copy from.

- Colleague only displays the list of catalogs if the program is already associated with more than one catalog.
- If the program is associated with just one catalog, Colleague automatically enters that catalog in the Copy From Catalog field.

Step 4 - In the To Academic Program field, enter the same program name as that in the Copy From Academic Program field.

Step 5 - In the To Catalog field, enter the name of the new catalog to which you want to associate the program.

Step 6 - Finish from the APCO screen.

- Colleague takes you to the Academic Programs (PROG) screen to define program characteristics.
- See "Defining Administrative Characteristics for a Program"

Step 7 – Update the PROG screen

- The APCO screen is re-displayed
- Either copy another program or finish from the screen

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Courses

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Defining Academic Levels

Responsibility: DA Group

Use the Academic Levels (ACLV) screen to define your academic levels.

See “Understanding Academic Levels” at www.datatel.com.

Step 1 – Access the Academic Levels (ACLV) screen

Step 2 – At the Academic Level LookUp, enter the code of the level

- If the record is not found, the Enter A to add prompt displays
- Enter A to add

GR	Graduate
HS	High School
LA	Law
MD	Medicine
UG	Undergraduate

Step 3 – Enter the description of the level

Step 4 – Detail on Class Level to the Class Level Rules (CLVR) screen to define class level

- Update the CLVR screen
- Enter GR for the Grad Class Levels

Step 5 – Do not enter a Default Transcript Grouping

Step 6 – Enter a Default Grade Scheme associated with the level

Step 7 – Do not enter a Default Equiv Minimum Grade

Step 8 – Enter Full Time/Ovrld/Half Time Hrs

- GR, MD, LA – 9, 13.00, 4.5
- UG – 12, 19.00, 6
- HS- Blank

Note: Effective F05, 12.01 was changed to 13.00 & 18.01 was changed to 19.00 because the overload doesn't become effective until the student hits 13 or 19 credits.

Step 9 – Enter Y if this is a graduate level; N if it is not

Step 10 – Detail on Enroll Status Rules to the Acad Level Enroll Status Rule (ALES) screen to define the enrollment status rule

- Update the ALES screen

Step 11 – Detail on Graduate Rules/Honors to the Academic Level Grad Honors (ALGH) screen to define the graduate honor rule

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- Update the ALGH screen

Step 12 – Detail on Standing Rules to the Academic Level Standing Rules (ALST) screen to define the term standing rules

- Update the ALST screen

Step 13 – Do not enter Completion Months

Step 14 – Enter the Default Acad Program/Status

- Enter SPEC.GENERIC for the UG level
- Enter SPECG.GENERIC for the GR level

Effective F10, this should give us 2 things:

1. If a student has future term registrations at the time of graduation, UACF will not re-activate the graduated program but will instead add the appropriate level generic program. The generic programs will need to be identified by the universities and changed to a valid program for that university.
2. If a student is registering for a level and does not have a program for that level, a generic program will be assigned and the level of the SACD section information will be recorded as the appropriate level. Again, the generic programs will need to be identified by the universities and changed to a valid program for that university.

Step 15 – Enter the Repeat Check Custom Subroutine

Step 16 – Do not enter Num of Meetings Absences

Step 17 – Update the ACLV screen

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Revised 10/24/06

Defining Catalogs

Responsibility: DA Group

Timeframe: Each May; two years in advance

Note: The CTLG merge will retain all comments from courses that were merged into the single entry. Catalogs can go back to 1935

Use the Catalogs (CTLG) screen to define the catalogs available from your institution.

Each catalog is defined according to a starting term and date, and an ending term and date. The catalog definition also includes all academic programs offered in that catalog.

Note: In the SD System, catalogs will begin with the summer term and end with the following spring term.

By **September 15** each year, the Registrar at each institution will notify the Master Program Database Coordinator of the programs to which the new catalog should be entered and choosing #1 or #2 below to move the catalog:

1. Add the catalog year directly to PROG only and provide a list of the programs (i.e. S.BSA&S.MATH) to which you want the catalog year entered on PROG only **OR**
2. Use Catalog Copy (CATC) which copies over all degree requirements from the previous catalog to APRS and adds the new catalog to PROG. Provide a list of the programs (i.e. S.BSA&S.MATH) for which you want the degree requirements moved.
3. Once the catalog has been entered on PROG by one of the two methods above, CATC cannot be used later to move the requirements. (i.e a university cannot decide to have the catalog entered directly on PROG at this time and then later request to move the requirements via CATC.
4. This date should be entered on the System Processing Calendar each year.

By **September 30**, the Master Program Database Coordinator will:

Create CTLG,

Add the next catalog to ADPA, and

Add catalog years to PROG or copy requirements (CATC) for each specific program as indicated by each institution.

This date should be added to the System Processing Calendar each year.

By **July 1** of the next year the new catalog year will be placed on WAPP (web parameter screen for degree audit). Since the new catalog begins with summer (i.e the 2007 catalog will begin with Summer 2007) the new catalog should be entered on WAPP at this time. This date should be added to the System Processing Calendar. RIS will enter the catalog on WAPP.

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The CATC process also copies academic requirements (as entered on the DAPR screen). However, it will not overwrite any requirements which may already have been specified for the new catalog.

Effective Fall 2010, online catalogs were approved and entered on programs designated by the universities as online programs. The online catalog helps differentiate the degree requirements between an online program and a traditional program.

Step 1 – Access the Catalog (CTLG) screen

Step 2 – Enter the catalog year

- At the Record not found – Enter A to Add prompt, Enter A

Step 3 – Enter a description

Step 4 – Enter Start dates and End dates

Step 5 – Verify the Acad Programs associated with this catalog

- Programs will be populated after the copy process

Note: When you add a catalog to a program, you should be “rolling” your catalog to populate a new catalog on PROG not entering the catalog directly on PROG. If you enter them directly on PROG, the degree audit requirements are not copied.

Step 6 – Update the CTLG screen

South Dakota Colleague System Procedures

Defining Course Defaults

Responsibility: DA Group

Use the Course Defaults (CDEF) screen to define course defaults.

Refer to “Understanding Course Defaults” for more information.

Step 1 – Access the Course/Section Defaults (CDEF) screen

Step 2 – Enter Credits = Contact Hours = Instructional Load

- 1.00 15.00 1.00
- 2.00 30.00 2.00
- 3.00 45.00 3.00
- 4.00 60.00 4.00
- 5.00 75.00 5.00
- 10.00 150.00 10.00

Step 3 – Define the following fields

Instr Method/Subroutine: 1:
Allow Course Waitlist...: No
Waitlist Code Default
Reqd Course Subroutine
Course Delimiter.....: -
Instr Method.....: R Lecture
Section Status.....: A Active
Section LookUp No Days.: 400
Faculty Comm Code
Student Comm Code
Instructor Consent: No
Allow Audit.....: Yes
Only Pass/No Pass.: No
Allow Pass/No Pass: Yes
Synonym Length....: 5
Generate Synonym...: Yes

Step 4 – Update the CDEF screen

South Dakota Colleague System Procedures

Central Maintenance Of The Master Course Database

Responsibility: Central

Timeframe: Ongoing

The following forms, after they have been approved, will be forwarded to the STUDENT Policy and Operations Administrator for central processing (via mail or email) by the designated University Contact:

- Minor Course Modification Requests
- Note: changes to courses in the System General Education Requirements must be reviewed by AAC, COPS, and the BOR.
- Experimental Course Requests
- Deletion of Courses (for Unique Courses only)
- It is important to receive a copy of the approved forms, and not a summary sheet, to permit responses to questions that may arise in the future. A file will be maintained of all requests by subject area.

The following forms, after they have been approved, will be forwarded to the STUDENT Policy and Operations Administrator (via mail or email) by the BOR Office for central processing:

- New Course Requests
- Revised Course Requests: Unique Courses
- Revised Course Request: Common Courses
- Existing Common Course Request
- Deletion of Courses (for Common Course)

Tables (such as SUBJECTS) and valcodes, which relate to Courses, will be maintained centrally.

Courses that did not merge correctly into a common course

- notify the STUDENT Policy and Operations Administrator and she will edit and, if appropriate, add the university location to the common course, delete the unique course, and equate the deleted unique course to the common course.

If a course merged in error

- notify the STUDENT Policy and Operations Administrator and she will edit and, if appropriate, delete the university location from the common course, readd the course as a unique course, and then equate it to the common course.

Timing is critical when adding, deleting, and changing courses. Please read the “Course Maintenance in Colleague” document that is in the appendix of the Curriculum Procedures. Based on the Effective Term that is entered on all course change forms, each university must edit their sections accordingly.

South Dakota Colleague System Procedures

Universities will be informed, via email, when the above approved requests have been recorded to the Master Course Database.

COURSE CHANGE APPROVALS REQUIRED

March 9, 2004

Unique Course Procedures and Processes

Change(s) Requested	Approval Form Required	Final Approval Entity
Add a new course	New Course Request (#5)	Exec Director
Add an Experimental Course (Offer no more than twice within 2 academic years)	Experimental Course Request (#3)	VPAA
Deletion of a unique course	Deletion of Courses (#1)	VPAA
Changing a unique course to a common course	Revised Course Request – Unique Course (#7)	Exec Director
Changing a common course to a unique course	Revised Course Request – Unique Course (#7)	Exec Director
Course number change to a number that is the same as a unique course number (with an “active” status) at another university.	Revised Course Request – Unique Course (#7)	Exec Director
Substantive change in the subject matter content of an approved course, change in CIP code, Assignment of or change of instructional method	Revised Course Request – Unique Course (#7)	Exec Director
Change in course numbering**, title, course prerequisite, course corequiste, course description (when it does not change course content), change in hours of credit, cross listing, equates, dual listing of 400/500 level, change in prefix, change in grading option, x9x series, enrollment	Minor Course Modification (#4)	VPAA

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limitation, Univ Dept Code,
repeatable for additional credit.

Courses approved as part of the approval for an additional major or minor	New Course Request (#5)	Exec Director
Any change to System General Education Requirement Courses	Revised Course Request – Unique Course (#7)	Exec Director/BOR
Tuition and Fee Assessment Changes	Presented to BAC, AAC	BOR

**You may only change a unique course number to another unique course number not currently being used as a unique course number with an “active” status at another university.

Common Course Procedures and Processes

Change(s) Requested	Approval Form Required	Final Approval Entity
Add a new course	New Course Request (#5)	Exec Director
Change in credit hours within approved variable credit, changing university specific section corequisites, crosslisting at the section level (not equates), and dual listing at 400/500 level.	Minor Course Modification (#4)	VPAA
Deletion of a common course	Deletion of Courses (#1)	Exec Director
Adding your location to a common course	Existing Common Course Request (#2)	Exec Director

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Course Equates at the course level	Revised Course Request-Common Course (#6)	Exec Director
Change in course numbering, title, course prerequisite, course corequisite, course registration restrictions, course description, change in prefix, credit hours not within approved variable credit.	Revised Course Request-Common Courses (#6)	Exec Director
Substantive change in the subject matter content of an approved common course, change in CIP Code, assignment of or change of instructional method.	Revised Course Request – Common Courses (#6)	Exec Director
x9x Common Numbered Courses	Minor Course Modification (#4)	VPAA
Tuition and Fee Assessment changes	Presented to BAC, AAC	BOR

South Dakota Colleague System Procedures

Revised 5/17/06

Creating a Course from Scratch

Responsibility: Central

Use the following procedure to create a course from scratch.

Step 1 - Access the Courses (CRSE) screen.

Step 2 - At the Course LookUp prompt, enter the subject and number for the new course.

- See “Understanding Creating Courses from Scratch” for a discussion of entering course names.
- Courses that are common will have one course entry in the electronic catalog.
 - Common courses will have the locations of all the institutions that have been approved to offer them.
 - Common courses will have a course type of COM.
 - Only the universities with a matching location can set up sections.
- Courses that are unique to a single institution will be unique in the electronic catalog and have their own entry.
 - Unique courses will have the location of the specific university it is associated with.
 - Unique courses will have a course type of UNQ.
 - Only the university with the matching location can set up sections.
- Beginning in Fall 2005, courses for articulated programs will be accomplished as follows:
 - A multiple credit block university course is added to the student’s academic record to represent the technical credit hours accepted toward the university program. The block course will be numbered ATIP 292 University Program in _____ and will be coded:
 - The ATIP 292 block course will carry variable credit – whatever is specified in the articulation agreement.
 - This block course for the university articulated program will be transcribed when the technical institute graduate completes the university requirements for the major.
 - A grade of CR will be associated with the ATIP 292 block course and will not be included in the grade point average.

Step 3 – If the subject and number do not exist, a Record not found – Enter (A) to add prompt displays

- Enter A to add

Step 4 - Finish defining the course by entering/reviewing the following.

Enter/Review Department and Percent

- Enter the smart-coded department(s)
 - Use the university identifier and ... for a listing
- Enter 100% for all departments entered

South Dakota Colleague System Procedures

- This will require the department to be entered at the section level.

Enter/Review Subject

Enter/Review Course Number

- Experimental courses are x99 with x dictated by the level of the experimental course requested

Note: Each experimental course, approved by the University VPAA, will be added to the database using the approved subject (prefix) and a course number of x99 as dictated by the level of the experimental course requested. The title, credits, cip code, instructional method, description etc. will be specific to the university requesting the course. Each experimental course will be unique for that university and will be added with a status of "E" Experimental, a specific Initial Term Offered, and an end date (the date of termination). Therefore, rather than having one ENGL 299 with generic data elements that is common for all Regental universities, there will be a specific ENGL 299 for each university. There is no problem with having more than one ENGL 299 in the database as it is the "course id" behind the course (created by Colleague as the course is entered) that makes it unique. Universities will then build sections from the experimental courses approved only for their university. This will be monitored by the location that is entered on the experimental course. Once the date of termination is reached, the university will not be permitted to add any additional sections.

Enter/Review Effective Dates

- The dates in this field define the start and end dates of the course's availability.
- The start date should be entered upon initial creation of the course but never changed after that.
- The End Date should only be entered when the course is inactivated or if this is an experimental course. If experimental, enter the date of termination as the end date.
 - For courses that are inactive in a future semester, enter the end date but leave the status as Active. An edit will be done at the end of each semester to inactive courses with past end dates. If the course is inactive before the end date, it can not be processed on the SECT screen.

Enter/Review Credit Type

- I for institutional
- IR for remedial
- The transcript groupings will include credit type as criteria for selecting courses for Degree Audit evaluations. Credit type is also used in determining how courses are used in calculating GPA and to determine what will print on a transcript.

Enter/Review Min/Max/Incr credits

- If the course is a fixed credit course, enter the number of credits in the Min cred field.

South Dakota Colleague System Procedures

- If the course is a variable credit course (can be taken for different numbers of credits), put the minimum credits in the Min cred field and the maximum credits in the Max cred field.
 - If the course is a variable credit course, put the credit increment this course can be taken for in the increment field.
 - This will match the minimum credit which is typically '1.0'.

Enter/Review the Course Levels

- Enter the level equal to the first digit of the course number.
 - For example 110 = level 100, freshman.
- Course levels can be directly referenced as limiting criteria in a Degree Audit evaluation.

Enter/Review the Academic Level

- Enter UG if course number is 100 – 499.
- Enter GR if course number is 500 or above.
- Enter MD for Med School
- Enter LA for Law School

Enter/Review the Grade Scheme

- UG if course number 100-499
- GR if course number is 500 or above
- MD if course is for Med School
- LA if course is for Law School

Enter/Review Short Title

- The short title, rather than the long title, appears on student transcripts generated from the Transcript Print (TRAN/TRRQ) screen.
- 30 character limit

Enter/Review Long Title

- Enter the full title as approved
- Defaults from short title

Enter/Review the Description

- Detail to Course Description screen (UTEC)
- Enter the full course description as approved

Note: If pre-requisites are listed here and on the Course Requisites (CREQ) screen, they both will print in the electronic catalog.

Enter/Review the Status, Appr Agency/Person and Appr Date

- Colleague maintains a history of the status of the course.
- You can detail to the Course Status History (CSTH) screen to view and modify the course's historical status changes.

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- When you create sections from a course record, you can only create sections from a course with a status of “Active.”
- Enter A for Active unless you are ending the course, then enter I for Inactive
 - If the new course is Experimental, enter E.
 - For courses that are inactive in a future semester, enter the end date but leave the status as Active. An edit will be done at the end of each semester to inactive courses with past end dates. If the course is inactive before the end date, it can not be processed on the SECT screen.
- Approval agency is the South Dakota Board of Regents
- Approval date defaults to the current date but can be overridden.

Enter/Review the National ID (CIP Code)

- Enter the Classification of Instructional Program (CIP) code as approved

Enter/Review the Local Ids

- Enter the predominant delivery method for this course
- Most will be 001 Face to Face
- This defaults to the section and can be changed there if the section is delivered differently.

Enter/Review the Location

- Enter the specific location (university) that is approved to offer this course
- If this course has been approved to be offered by more than one university, all university locations should be entered. When you schedule sections for this course, the locations you enter in this field have the following effect:
 - If you list one or more locations, the section can only be scheduled at one of those locations. The location will not default into the section but it does become a required field on the section.
 - If you enter only one location, then that location will default into the Location field on the Sections (SECT) screen when you create a section from this course.
- This field serves two purposes: You can use it to limit the locations where the course can be offered, and you can detail to the Course Restrs by Location (CLRS) screen to define registration restrictions for the course which apply only to a particular location.

Enter/Review Course Types

- Enter/review COM for course types for the common courses
- Enter/review UNQ for course types for the unique courses
- Enter/review course types for general education core
 - Effective F05, the BOR approved new general education curriculum for the system. Course types for the new gen ed were added with the following naming convention:
 - Goal
 - C or Composition, P for Speech, S for Social Sci, H for Humanities, M for Math and N for Natural Sci)

South Dakota Colleague System Procedures

- yy – 05
 - 1st 2 characters of the prefix
 - RE for Religion, RU for Russian, etc.
- Note:** Since the Natural Science disciplines did not need to be split out for the gen ed restriction or DA, the prefix is SC for the lecture & LB for the labs.
- Eff S07, OSCBA was approved for BOR approved P/F SDOS eligible courses
 - OSCBA is added to the course when the approved SDOS P/F course is approved for all universities; OSSPF is added to the section when the approved course is only approved SDOS P/F for a particular university

Note: Course type can be referenced in a Degree Audit rule.

Enter/Review Topic Code

- This is the actual location where the course is being delivered.

Step 5 – Update the CRSE screen

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Revised 9/10/05

Defining Course Location Prerequisites

Responsibility: Central

Use the Course Location Prerequisites screen to define an additional prerequisite for a course, for a specific location. This prerequisite must be met in addition to the prerequisite specified on Course Requisites (CREQ).

Complete the following steps to define additional course prerequisites:

Step 1 - Access the Course Location Prerequisites (XCLP) screen.

- Colleague will display the XCLP screen with the prompt at the Course LookUp.

Step 2 - Enter or LookUp the course for which you want to define additional prerequisites.

Step 3 - Enter or LookUp the location (university) for which you want to define additional prerequisites.

Step 4 - Enter the course prerequisites.

- Any prerequisites entered here must be met in addition to any prerequisites defined on the CREQ or SREQ screens.
- Use field lookup for help with prerequisite syntax.

Note: The data entered here is stored in the database exactly as it is typed. Therefore, pre-requisites should always be entered in UPPERCASE.

Step 5 - Press finish or update.

Step 6 - If there are no errors with the prerequisites, you will be taken back to the menu.

- If there are errors, a screen will be displayed showing the errors.
- Correct the errors and finish/update from the screen.

South Dakota Colleague System Procedures

Defining Course Offering Information

Responsibility: Central

Use the Course Offering Info (COFF) screen to record offering information for a course such as instructional method and load information, session cycles, and yearly cycles in which the course is offered.

Step 1 - Access the Course Offering Information (COFF) screen from the Offering Info field on the CRSE screen or from the menu.

Step 2 – Enter/Review the Instructional Method

- Enter the instructional method as approved
 - If this is a common course, it may list multiple instructional methods. The approved method for each institution will need to be verified at the section level.
- The instructional load and contact hours default from the Course/Section Defaults (CDEF) screen but may be changed
 - The default is credits for Instr Ld and credits X 15 for contact hours
 - A lab will have different Instr Ld and contact hours as there may be no credits for the course and contact hours require two to three hours per lab
 - The information you enter on the COFF screen defaults to the sections you create from the course.

Step 3 – Enter/Review the Number of Weeks

- Enter 15 for the typical number of weeks in the semester

Step 4 – Enter/Review the Session Cycle

- Enter the cycle as approved
 - Example: Spring Only, Fall only

Step 5 – Enter/Review the Yearly Cycle

- Enter the yearly cycle as approved
 - Example: Even years, Odd years

Step 6 – Enter/Review the Schedule Type

- Enter the predominant schedule type
 - Most GR level will be GSTON
 - Most UG level will be USTON
 - Most Med will be MSTON
 - Most Law will be LSTON
 - AIR and MSC will be USTXT
- This defaults to the section and can be changed there if the section schedule type should be different than the course schedule type.

Step 7 – Update this screen and continue with the Course Requisites (CREQ) screen

Defining Course Requisites

Responsibility: Central

Use the Course Requisites (CREQ) screen to define prerequisites, corequisite courses and corequisite noncourses for a specific course.

Step 1 – Access the Course Requisites (CREQ) screen from the Requisites field on CRSE or from the menu

Step 2 – Enter/Review the Prerequisites

- Enter the prerequisites as approved
- Pre-requisites can only be maintained at the course level

Note: The data entered here is stored in the database exactly as it is typed. Therefore, pre-requisites should always be entered in UPPERCASE.

Step 3 – Enter/Review the Corequisites

- Enter the corequisites as approved
- If the course is a common course, but corequisites are not common, the corequisite will be entered as a section corequisite.
- If the course content of a course, used as a corequisite, has changed resulting in the creation of a new course entry, the corequisite will need to be re-entered to bring in the new course IDs.

Step 4 - Can the course only be taken concurrently?

Yes - Enter “Y” in the Concurrent Enrollment Required field.

No: Enter “N” in the Concurrent Enrollment Required field. If you enter “No” here, the student may either have previously taken the course or may enroll concurrently.

Step 5 – Enter/Review a Corequisite Noncourse

- In some cases, you may want to allow a student to satisfy a prerequisite by either completing a course or achieving a minimum score on an admissions test. For example, your institution might require that, before taking Math 102, a student either complete Math 101 or achieve a score of 600 on the Math SAT. You cannot directly define a test score as a prerequisite in Colleague. (This is because you define prerequisites using Degree Audit syntax, which does not support test scores.) However, you can indirectly define a test score as a prerequisite using the procedure below.

On the Noncourses (NONC) screen, define the admissions test as a noncourse in Colleague. Define the Math SAT as a noncourse named, for example, “SATM.”

- See the “Recruitment/Admissions Management” or the “Curriculum/Academic Records” section for the procedure for defining noncourses.

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On the Courses (CRSE) screen, create a pseudo course.

- You will not create sections or register students for this course; its only purpose is to stand in for the admissions test as a course prerequisite. Pseudo courses are also used for transfer electives (e.g. ENGL 100T).
- Create your pseudo course
 - For more information, see “Creating Courses from Scratch”.
 - Pseudo courses must have a credit type of “I” for institutional.
 - The credits must be 0.00-99.00 with a 1 credit increment.
 - There is no entry in the national ID, local ID or topic code.
 - Course type is PRQ for pseudo courses that are prerequisites.
 - Course type is TRN for pseudo courses that are transfer electives.
 - Reg Retake policy is unlimited and count retakes must be set to “Yes”.

On the Noncourse Equivalencies (NONE) screen, define an equivalency between the noncourse (admissions test) and the pseudo course you just created.

On the Noncourse Equivalencies (NONE) screen:

- At the Noncourse LookUp prompt, enter the noncourse name.no
- In the Equivalent Course field, enter your pseudo course.
- In the Min Score field, enter the score.
- See the “Recruitment/Admissions Management” or the “Curriculum/Academic Records” section for the procedure for defining noncourse equivalencies.

On the Noncourse Equiv Evaluation (NEQV) screen:

- In the Credit Type field of the Equivalent Course window, assign a credit type of NC to ensure that the pseudo course will not appear on the student’s transcript or be included in Degree Audit evaluations.
- In the Status field of the Equivalent Course window, assign a status with a special processing code of 7, which indicates approved transfer credit.
 - Assign a status of “TR” (Transfer Equiv Eval) or “NC” (Noncourse Equivalency).

Step 6 - On the Course Requisites (CREQ) screen:

- Access the course for which you want the admissions test to be a prerequisite.
- In the Prerequisites field, define the pseudo course as a prerequisite.

Note: You can use a similar procedure to determine whether a student needs to take a remedial course. For example, your introductory English course for all first-year students might be English 101, but you might require any student who had not scored at least 475 on the English SAT to take a remedial course (English 010) first. In that case, you would equate the noncourse (English SAT) to English 010, and define English 010 as a prerequisite for English 101. When you attempted to register an incoming first-year student for English 101, Colleague would prevent the registration, and would notify the user that the remedial course was a prerequisite, if the student had not achieved a score of at least 475 on the English SAT.

South Dakota Colleague System Procedures

Step 7 – Update the screen and continue with the Course Restrictions (CRES) screen

Step 8 - If there are no errors with the prerequisites, you will be taken back to the menu.

- If there are errors, a screen will be displayed showing the errors.
- Correct the errors and finish/update from the screen.

Defining Course Restrictions

Responsibility: Central

Course restrictions are registration and scheduling limitations on each section created from a course.

Step 1 - Access the course restriction (CRES) screen from the menu or by detailing from the Restrictions field on the Courses (CRSE) screen.

Step 2 – Enter/Review the Default, Schedule Capacity & Minimum Enrollment

- The default capacity determines how many students will be allowed in the course.
- The schedule capacity determines the absolute maximum of students in the course.
- It is recommended that default capacity and schedule capacity be the same.
- The minimum enrollment determines the minimum number of students that should enroll in this course. This could be used for 7/10 purposes.
 - Enter 7 for courses 500 or above
 - Enter 10 for courses 000 to 499.
- This defaults to the section and can be changed there.

Step 3 – Enter/Review Reg Restrictions, Other Restrictions & Location Restrictions

Naming convention for rules is (x)University or (C)ommon -> module -> CR (Course restriction) -> name

- Enter a rule based restriction or a non-rule based restriction for registration
 - If this is a common course, the rule based Reg Restriction should be maintained by detailing on the locations field and entering it there
 - If this is a common course, the non-rule based restriction should be maintained at the section level
- You can define location-specific registration restrictions using the Course Restr by Location (CLRS) screen. You can access the CLRS screen from the menu or by detailing from the Locations field on the Courses (CRSE) screen.
 - You can also define specific Capacity, Schedule Capacity and Minimum Enrollment for each university listed in the locations field

Step 4 – Edit/Review Reg Retake Policy

- The registration retake policy dictates how many times a student may register for a course. During registration, Colleague will check the student's academic record and the retake policy for a course, before registering a student for a course. Colleague will enforce the system retake policy, disallowing registration that violates a course's retake policy.
 - Populate the Reg Retake Policy as follows:
 - For courses with course levels of 001 to 400,
 - If the Count Retakes for Credit is "Yes",
 - Set the Reg Retake Policy to "UNLUG" (Unlimited Undergraduate).
 - For courses with course levels of 500 and above,

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- If the Count Retakes for Credit is “Yes”
- Set Reg Retake Policy to “UNLGR” (Unlimited Graduate).
- For courses with course levels of 001 to 400,
 - If the Count Retakes for Credit is “No”
 - Set the Reg Retake Policy to “Three”.
- For courses with course levels 500 and above,
 - If the Count Retakes for Credit is “No”
 - Set the Reg Retake Policy to “Two”.

Step 5 - Count Retakes for Credit

- Your entry in this field determines how the student’s records are affected if they retake the course:
 - If you enter **Yes**, the student receives credit for each successful completion of this course. Enter Yes for those courses a student can take multiple times and receive credit. For example, Special Topics, Special Problems, Thesis, etc.
 - If you enter **No**, then Colleague uses the grade scheme rules associated with the course to determine which grade to count. The system counts the last grade.

Note: The Retakes Policies (RPOL) screen will control how many times a student can register for a class if RGCT is set to check for retakes and RGUS doesn’t allow overrides. RPOL does allow the student to get credit for every instance of the course he/she completes. If you want to control the number of times the student can register for that course, a repeat policy is needed on it that limits that. For instance, if a student can earn credit for MUS-111 twice – but only twice – I need to have Count Retakes for Cred set to Yes, and I need to have a repeat policy (set up on RPOL) on it that says the student may only register for the class two times. If the student DOES (somehow) register for the class a third time, he/she will still get credit for it.

Replace allowed” is what happens when a system finds we have two courses with the same course ID or (at least some) courses that are equated in history. One needs to be replaced. The repeat policy, which is attached to the grade scheme, is what determines which course to use as the replacement. If we have manual credit set to ‘yes’, they do not get recalculated. The system will have a custom repeat policy: a course taken prior to Fall 2003 only marks as repeat a course with the same course ID and the same smartcoded course credit type. Fall 2003 and later the custom repeat policy will mark as repeat a course with the same course ID and will not look at credit type.

Step 6 – Enter/Review Equipment, Supplies, Room Characteristics & Room Types

- If this is a common course, this information should be maintained on the section.
- If this course requires special equipment or supplies, enter them here
- If this course requires special room characteristics or room types, enter them here

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- For example, if the course required accounting tables, the room characteristic of ACCF or ACCU would be entered
- For example, if the course required a smart classroom, the room type of SC would be entered
- These all need to be defined on the room
 - See Defining Facilities for more information

Step 7 – Enter/Review Instructor Consent & Petition Required

- If this course requires written consent to register, enter Yes to both
- Written consent is usually “No” at the course level. When required it is entered at the section level.

Step 8 – Enter/Review Grades Allowed

- Enter the grades allowed as approved
- Options are to enter Y/N flags to Allow Audit, Only Pass/No Pass, and Allow Pass/No Pass.

Normal Grading

- Requires assignment of letter grades (A, B, C, D, and F)
- Normal grading is permitted only if Field #16 (Only Pass/No Pass) on CRES or SRES is set to “No” or if Field #17 (Allow Pass/No Pass) on CRES or SRES is set to either “Yes” or “No” and the individual student has not selected the pass/fail option at the time of registration.

Pass/Fail Grading

- Requires assignment of S/U grades
- The assignment of an S/U grade is permitted only if Field #16 (Only Pass/No Pass) is set to “Yes” on CRES or SRES or if an individual student requests the pass/fail option at the time of registration (Field #17 must be set to “Yes” either on CRES or SRES to permit this option).

Other Grades

- Other grades such as I, IP, and NP can be given any time the specific criterion of these grades are met. These grades can be given if the course/section is set up for Pass/Fail Grading or for Normal Grading.

Note: During its June 9, 2005 meeting AAC approved the following:

1. x9x series: grading may be A, B, C, D, F, S, U. The decision will be made by the university and entered at the section level when the course is created in Colleague. The university may seek faculty input. When an x9x course or unique course is initially created at the course level (centrally) it will be assumed that A, B, C, D, F grading will be required unless the New Course Request indicates otherwise. Universities requesting a change to S/U grading for a course must submit a Minor Course Modification form. After approval is obtained the grading change is made at the section level by the universities.
2. For all common courses, assume that grading is A, B, C, D, F unless S, U is specified. When a common course is initially created at the course level

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(centrally) it will be assumed that A, B, C, D, F grading will be required unless the New Course Request indicates otherwise. A university requesting a change in grading for a common course (other than the x9x courses above) must submit a Revised Course Request - Common Courses. Upon receipt of approval, the university will make this change at the section level.

3. A university may determine to use S, U for all sections of a common course after approval of a Revised Course Request - Common Course Form.

Step 9 – Enter/Review Allow Waitlist

- If you enter [Y], Colleague creates a waitlist once the capacity limits are reached.
- If you enter [N], Colleague does not create a waitlist, and the course is closed when the capacity is reached.
 - If No is entered, remove any information in Waitlist Enroll No Days and set Waitlist Mult Sections to N.

Step 10 – Enter/Review Waitlist Rating

- The rating you defined on the Waitlist Defaults (WLDF) screen defaults to the course records. You can change the rating as necessary.

Step 11 – Enter/Review Waitlist Enroll No Days

- When a student is on a waitlist, an institution may offer the student a seat, but only for a certain length of time. This is the number of days a student has to accept the offer of enrollment in a section of the course for which the student was waitlisted.

Step 12 – Enter/Review Waitlist Mult Sections

- Enter Y if students are allowed to waitlist for as many sections of this course as they want.
- Enter N if they can waitlist for only one section.

Step 13 – Update the CRES screen

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Revised 2/2/04

Defining Course Billing Information

Responsibility: Central

Use the Course Billing Information (CRSB) screen to define billing information for the course.

Step 1 - Access the Course Billing Information (CRSB) screen from the menu or from the Billing Info field on the Courses (CRSE) screen.

Step 2 – Enter/Review the Billing Method

- Enter T for table info (most will be this)
- Enter S for section info

Step 3 – Enter/Review Billing Period Type

- Enter T for term

Step 4 - Periodic Billing

- Defaults as No

Step 5 – Enter/Review Billing Credits

- Enter the min credits from the CRSE screen for a fixed credit course
- If variable, leave blank
- The credits listed here determine the billing credits for the students.

Step 6 - Schedule Type

- Enter the predominant schedule type
 - Most GR level will be GSTON
 - Most UG level will be USTON
 - Most Med will be MSTON
 - Most Law will be LSTON
 - AIR and MSL will be USTXT
 - WD 101/801 will be USTZ1
- This defaults to the section and can be changed there if the section schedule type should be different than the course schedule type.

Step 7 – Enter/Review Other Charges

- Enter other charges
 - This is other charges (not charged on RTRT) such as liability charge or testing... any charge for a course other than tuition (for example, the ed fees...)
- These will need to be changed every year when the new tuition and fees are approved by the BOR.
- Lab fees will be coded on SFIN and referenced in rules

South Dakota Colleague System Procedures

Step 8 – Update this screen and continue with the Additional Information (ACOI) screen.

South Dakota Colleague System Procedures

Revised 5/6/05

Defining Additional Course Information

Responsibility: Central

From the Additional Info field on the CRSE screen, you can detail to either of two screens:

Step 1 – Access the Additional Course Information (ACOI)

Step 2 – Detail on the Equates Code field

Step 3 – At the Course Equate Code Lookup, enter the new code or ... to browse existing codes

- If entering a new code, enter A to add
 - Choose a name with no spaces limited to 15 characters
 - Use the SUBJ####*SUBJ### convention.
- If reviewing an existing code, pick the code from the resolution table

Step 4 – Enter/Review the Description for the code

- Include in the description the course names and a reason for the equate
- For example: ART111*ARTS 111 Prefix chg

Step 5 – Enter/Review the courses associated with the equate

Note: Course equate codes affect both the registration process and the academic program evaluation process. When you register a student for a course, Colleague will compare the student's record to the course and to the courses listed on the EQCD screen to determine if the student has previously taken the course or an equivalent. When you use the Degree Audit module to perform an academic program evaluation, the evaluator checks each course on a student's record including the equated courses to determine if the program requirements have been met. Sometimes, if there are multiple equates associated with a single course, DA will not read the other equates. In that case, all the equates should be entered together into one.

Step 6 - Provide additional comments about the course using the comments field

- Date stamp first and then enter the comment
- Comments such as why the course is being changed, changed from what to what and effective date
- When you enter the comment include the University in the comment.
- Course comments made prior to the merge will be smart-coded and retained during the merge.
- The history of courses and equates that merged into a common course will be displayed.

Step 7 – Update the EQCD -> ACOI ->CRSE screens

South Dakota Colleague System Procedures

OR

Step 1 – Access the Schedule 25 Course Info (S2CO) screen

Step 2 - Enter course information for use with Schedule 25

- Do not define S25 information on common courses; define it at the section level for common courses
- Preferred Partitions – does this course have one?
- Equipment Required – does this course always require equipment
 - Equipment must be defined on the rooms
- Room Characteristics – what room characteristics are required for all sections?
 - Room characteristics must be defined on the rooms
- Room Types – what room types are required for all sections?
 - Room types must be defined on the rooms
- Conflict Decider – what is the priority of this information for S25?

Step 3 – Finish out of the S2CO -> CRSE screens

South Dakota Colleague System Procedures

Defining Course Waitlist Defaults

Responsibility: Central

Timeframe: One time setup

Step 1 - Allow Course Waitlist Default – this default is used when new courses are created and can be overridden at the course and section level. It is not used by IWLF to update existing Course & Section records.

- Enter 'N'

Step 2 - Waitlist Rating Default – this default is used when new courses are created and can be overridden at the course and section level. It is not used by IWLF to update existing Course and Section records

- Leave blank

Step 3 - Required Course Subroutine

- Leave blank

Step 4 - Enroll Number of Days Default

- Enter 1

Step 5 - Multiple Sections

- Enter 'Y'

Step 6 - E-mail Type

- Enter PRI

Step 7 - Space Available Paragraph

- Enter CRPWLAV

Step 8 - Student Enrolled Paragraph

- Enter CRPWLAV

Step 9 - Space Available Comm Code

- Enter CRCWLAV

Step 10 - Space Available Comm Status

- Enter R Received

Step 11 - Student Enrolled Comm Code

- Enter CRCWLEN

Step 12 - Student Enrolled Comm Status

- Enter R Received

South Dakota Colleague System Procedures

Revised 10/24/06

Defining Course Waitlist Criteria

Responsibility: Central

Note: On all Registration Controls (RGCT), Allow enrollment in Waitlisted Courses is set to “NO” for Prereg, Reg, Add/Drop and Other. This means that students cannot enroll if a waitlist has begun for a section.

Note: In the merged environment, waitlist can only be allowed at the section level on common courses.

Complete the following steps to define course waitlist criteria:

Step 1 - Familiarize yourself with defining course waitlist criteria.

- See “Understanding Course Waitlist Criteria” at www.datatel.com.

Step 2 - Access the Course Restrictions (CRES) screen.

- You can access the CRES screen by detailing from the Restrictions field on the Courses (CRSE) screen or directly from the menu.

Step 3 - In the Allow Waitlist field, if you enter Y, Colleague creates a waitlist after the capacity limits are reached.

- If you enter N, Colleague does not create a waitlist, and the course is closed when the capacity is reached. You can define the default value for all courses on the Course Defaults (CDEF) form.
- You can change the value on the course record as necessary. The value you define on the course record defaults to all sections you create from the course.
- This field will be set to “No” for all common courses.
 - You can change the value on each section record as necessary.

Step 4 - In the Waitlist Rating field, the rating you defined on the Waitlist Defaults (WLDF) form defaults to the course record. You can change the rating as necessary. Colleague uses this rating to rank the priority of students on the waitlist.

- The value you enter defaults to the sections you create from the course. If necessary, you can override the waitlist rating for each section.
- If you leave the Waitlist Rating field blank, students are listed on the waitlist in the order in which they enrolled on it.
- You can detail to the Course Waitlist Ratings (CWLR) form from the Waitlist Rating field, to further define the waitlist ratings for this course. See “Waitlist Ratings” for more information about defining your waitlist ratings.
 - Define the Rule and Points associated with the ratings if they are not already established
 - Naming convention for rules are university or common -> module -> name

Step 5 - In the Waitlist Enroll No Days field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

South Dakota Colleague System Procedures

- This field is used as a default to course locations. If course locations do not exist, this field is used as a default to all sections created from this course. It can be changed as needed at either level.
- If this field is left blank, there will be no default for course locations or for sections (if course location restrictions do not exist). In addition, your institution will not be able to use the waitlist status of Permission to Register.
- This means that students cannot be offered seats through the Waitlist Availability (WLAV) process, and that waitlists will be handled manually through the following waitlist management forms:
 - Course Waitlist Management (CWLM)
 - Section Waitlist Management (SWLM)
 - Course Waitlist Alternatives (CWLA)
 - Section Cross-List Waitlist (SXWL)

Step 6 - In the Waitlist Mult Sections field, enter Y to let students waitlist into multiple sections of this course.

- Regardless of what you enter, a student will be allowed to waitlist for multiple sections of this course if the sections are in different terms or do not overlap dates if there is no term. This field will be used as a default to course locations.

Step 7 - Update the CRES screen.

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Setting Up Waitlisting Parameters

Responsibility: RIS

Timeframe: One time setup

Step 1. Access WLDF Waitlist Defaults. In the Allow Course Waitlist Default field, enter N to not allow waitlisting as the default for courses.

- Enter **Y** if you want the default setting to be that courses allow waitlists; otherwise enter **N**.
- The value set here defaults into all courses, but can be overridden at the course and section level.

Step 2. In the Waitlist Rating Default field, enter the code of the waitlist rating criteria to use as the default for courses. Leave Blank.

- Each waitlist rating criteria has an identifying code, which is listed on courses and sections that share that criteria. This field uses the WAIT.LIST.RATINGS file, which is a set of rules used to assign waitlist ratings. Enter the code to use as the default for courses. The code you enter here defaults into all courses, but can be overridden at the course and section level.
- If this field is blank, there is no rating code default for courses.
 - Leave Blank

Note: Waitlist rating criteria for courses are defined on the Course Waitlist Ratings (CWLR) form.

Step 3. In the Required Course Subroutine field, enter the subroutine name to be used to determine if the course is required. Leave Blank.

- The subroutine name you enter is used by Colleague to determine if a course is required for a student. In waitlist management, you can assign a rating for a course that is required by a student. Colleague uses the subroutine name that you enter in this field to determine if the course for which the student is waiting is required for that student.
- If weighting based on required courses is not needed for waitlist management, you may leave this field blank.
 - Leave Blank

Step 4. In the Enroll Number of Days Default field, enter the number of days a student has to accept an offer of enrollment from a waitlist. Enter 1.

- When a student is on a waitlist, an institution may offer the student a seat, but only for a certain length of time. This is the number of days a student has to accept the offer of enrollment in a section of the course for which the student was waitlisted.
- This field will be used as a default to all courses, where it will be used as a default to course restrictions by location and sections. At the section level, if a student is offered enrollment in a waitlist, and enrolls within the number of days allowed, then the student is given a seat regardless of the section capacity.
- If this field is left blank, there will be no default for courses.

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Step 5. In the Multiple Sections Default field, enter N to not let students waitlist into multiple sections of the same course.

- Institutional policy says whether or not a student is allowed to be on the waitlist of more than one section of a course at the same time.
- Enter **Y** if students should be allowed to waitlist for as many sections of a course as they want.
- Enter **N** if they should waitlist for only one section.
- This field is used to default to courses (on the Course Restrictions [CRES] form) where it will be used as a default to course restrictions by location if locations exist (displayed on the Course Restrs by Location [CLRS] form).
- Even if you enter **N**, a student will be allowed to waitlist for multiple sections of the same course (and course locations if created for the course) if the sections are in different terms or do not overlap if there is no term.

Step 6. In the E-Mail Type field, enter the type of e-mail address to use for waitlist e-mail. Enter PRI

- Waitlist e-mails will be sent only to e-mail addresses of this type. The e-mail type you enter here is used when notifying students that they have permission to register or are enrolled in a section for which they were waitlisted.
- If this field is left blank, e-mail cannot be used to notify students in waitlist management. However, Colleague will assign a Space Available communication code or a Student Enrolled communication code if these are defined on WLDF.

Note: E-mail types can be set up for a student on the Name and Address Entry (NAE) form.

Step 7. In the Space Available Paragraph field, enter the paragraph that defines the content of the e-mail that is used by the waitlist management forms and the Waitlist Availability (WLAV) form to notify students that a seat is available in the section for which they are waitlisted. Enter CRPWLA V

The waitlist management forms are:

- _ Course Waitlist Management (CWLM)
- _ Section Waitlist Management (SWLM)
- _ Course Waitlist Alternatives (CWLA)
- _ Section Cross-List Waitlist (SXWL)
- You can enter the ID of an existing paragraph, or detail to the Define Custom Paragraphs (DPAR) form to define a new paragraph or edit an existing paragraph. If you detail to DPAR, you must enter WAIT.LIST, PERSON, or STUDENT in the Merge File field.
- If this field is left blank, an e-mail will not be sent to notify students of seat availability. However, Colleague will assign a Space Available communication code, if one is defined in the Space Available Comm Code field on WLDF.
- The e-mail goes to the student's e-mail address of the type defined in the E-Mail Type field. The E-Mail Type must have a value to enter this paragraph field.
- If you want to define a custom paragraph, see "Defining a Custom Paragraph".

South Dakota Colleague System Procedures

Step 8. In the Student Enrolled Paragraph field, enter the paragraph e-mailed to students to say they've been registered. Enter CRPWLEN.

- Enter the paragraph that defines the content of the e-mail that is used by the waitlist management forms and the Waitlist Availability (WLAV) form to notify students that they have been enrolled in a section for which they were waitlisted. The waitlist management forms are:
 - _ Course Waitlist Management (CWLM)
 - _ Section Waitlist Management (SWLM)
 - _ Course Waitlist Alternatives (CWLA)
 - _ Section Cross-List Waitlist (SXWL)
- You can enter the ID of an existing paragraph, or detail to the Define Custom Paragraphs (DPAR) form to define a new paragraph or edit an existing paragraph. If you detail to DPAR, you must enter WAIT.LIST, PERSON, or STUDENT in the Merge File field.
- If this field is left blank, e-mail will not be sent by the waitlist management forms or WLAV when a student is enrolled. However, Colleague will assign a Student Enrolled communication code, if one is defined in the Student Enrolled Comm Code field on WLDF.
- The e-mail goes to the student's e-mail address of the type in the E-Mail Type field. The E-Mail Type must have a value in order to enter this paragraph field.
- If you want to define a custom paragraph, see "Defining a Custom Paragraph".

Note: You can modify the Sender information of the e-mail that is automatically sent to a student upon finishing from SWLM, CWLM, CWLA, or WLAV. To do this, use the E-mail Registration Return Address field on the Registration Web Parameters (RGWP) form.

Note: You can modify the Sender information of the e-mail that is automatically sent to a student upon finishing from SWLM, CWLM, CWLA, or WLAV. To do this, use the E-mail Registration Return Address field on the Registration Web Parameters (RGWP) form.

Step 9. In the Space Available Comm Code field, enter the communication code to be used to send availability notices. Enter CRCWLAV.

- This is the communication code that will be used to produce a document to be sent to inform students that seats are available in a section for which they are waitlisted. The communication code is used only if permission to register was granted on the waitlist management forms or the Waitlist Availability (WLAV) form, and if an e-mail address of the specified type is not found or there is no Space Available Paragraph. The waitlist management forms are:
 - _ Course Waitlist Management (CWLM)
 - _ Section Waitlist Management (SWLM)
 - _ Course Waitlist Alternatives (CWLA)
 - _ Section Cross-List Waitlist (SXWL)

Step 10. In the Space Available Comm Status field, enter the communication code status to be set when this communications management record is created. Enter R for Received.

South Dakota Colleague System Procedures

Step 11. In the Student Enrolled Comm Code field, enter the communication code to be used to send enrolled notices. Enter CRCWLEN.

- This is the communication code that will be used to produce a document to be sent to inform students that they have been registered in a section for which they were waitlisted. The communication code is used only if the waitlist management forms or the Waitlist Availability (WLAV) form cannot find an e-mail address of the specified type or there is no Student Enrolled Paragraph. The waitlist management forms are:
 - _ Course Waitlist Management (CWLM)
 - _ Section Waitlist Management (SWLM)
 - _ Course Waitlist Alternatives (CWLA)
 - _ Section Cross-List Waitlist (SXWL)
- If this is left blank, no documents are sent to students to notify them of registration of waitlisted courses.

Note: If an e-mail type is not defined on WLDF or if the e-mail type defined cannot be found (or if there is no Space Available Paragraph or Student Enrolled Paragraph defined), communication triggered by the waitlist management form can generate Communications Management documents (if defined on WLDF). These documents are pending and must be processed through the Process Correspondence Batch (PCB) form in a timely manner so that students are notified.

Note: If an e-mail type is not defined on WLDF or if the e-mail type defined cannot be found (or if there is no Space Available Paragraph or Student Enrolled Paragraph defined), communication triggered by the waitlist management form can generate Communications Management documents (if defined on WLDF). These documents are pending and must be processed through the Process Correspondence Batch (PCB) form in a timely manner so that students are notified.

Step 12. In the Student Enrolled Comm Status field, enter the communication code status to be set when this communications management record is created to notify students they have been registered. Enter R for Received.

Step 13. Save your work.

South Dakota Colleague System Procedures

Initializing New Waitlist Fields (IWLF)

Responsibility:

Timeframe:

Step 1. In the Waitlist Mult Sections field, enter Y to allow waitlisting in multiple sections of a course at once.

- If students should waitlist for only a single section of a course per time period, such as a term, enter N.
- If you have not previously run this process, this defaults from the Multiple Sections Default field on the Waitlist Defaults (WLDF) form and can be changed as needed. On subsequent runs of IWLF, this field will display what was entered on the previous run done by the same user.

Step 2. In the Waitlist Enroll No Days field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

- When a student is on a waitlist, an institution may offer the student a seat, but only for a certain length of time. This is the number of days a student has to accept the offer of enrollment in a section of the course for which the student was waitlisted.
- If you have not previously run IWLF, this defaults from the Enroll Number of Days Default field on the Waitlist Defaults (WLDF) form and can be changed as needed. On subsequent runs of IWLF, this field will display what was entered on the previous run done by the same user.

Note: A warning is issued if this field is blank but the Enroll Number of Days Default field on WLDF has been defined, as doing this will delete the value of the number of days to accept on the records you selected. You should leave this field blank the first time IWLF is run only if waitlisted students are not usually notified of seat availability. On any subsequent runs of IWLF, the field should be blank if waitlisted students are not notified of seat availability for the courses being selected.

Step 3. In the Saved List Name field, enter a saved list of COURSES IDs to include.

- This field must be blank the first time IWLF is run. If entered, only COURSES IDs in the saved list are eligible for selection.

Step 4. In the Locations field, enter locations of courses to be included.

- This field must be blank the first time IWLF is run. If entered, only courses that have any location matching an entry in this list are eligible for selection.

Step 5. In the Update Courses field, enter Y to update courses and location-specific restrictions.

- Enter N if only location-specific course restrictions and sections are to be updated.

Note: If a course has multiple locations, and more than one of the locations is in this list, and one location says “Yes” and another says “No,” the overall course restrictions will be updated.

South Dakota Colleague System Procedures

Step 6. In the Academic Levels field, enter the academic level of the courses to be included.

- This field must be blank the first time IWLF is run. If entered, only courses that have an academic level matching an entry in this list are eligible for selection.

Step 7. In the Schools field, enter the schools to which a course department must belong to be included.

- This field must be blank the first time IWLF is run. If entered, only courses that have any department associated with a school matching an entry in this list are eligible for selection.

Step 8. In the Divisions field, enter the divisions to which a course department must belong to be included.

- This field must be blank the first time IWLF is run. If entered, only courses that have any department associated with a division matching an entry in this list are eligible for selection.

Step 9. In the Departments field, enter the departments to which a course must belong to be included.

- This field must be blank the first time IWLF is run. If entered, only courses that have any department matching an entry in this list are eligible for selection.

Step 10. In the Additional Selection Criteria field, enter N if this is the first time you are running IWLF; if not, enter Y or N.

- This field must be “No” the first time IWLF is run. After the first run, if you want to further narrow your selection for this process, enter **Y** in this field.
- When you finish or update from this form, the Additional Selection Criteria form is displayed, where you can enter other selection criteria or construct your own criteria using the selection connectors.
- Enter **N** in this field or leave it blank if you do not want to set up any other selection criteria. The Additional Selection Criteria form will not be displayed.

Note: This field uses the COURSES file.

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Viewing a Course Waitlist

Responsibility: University

Step 1 – Access the Course Waitlist Inquiry (CWLI) screen

Step 2 – Enter the course at the lookup prompt

Step 3 – A listing of the courses with waitlists displays showing section capacities

South Dakota Colleague System Procedures

Defining Course Waitlist Defaults

Responsibility: Central

Complete the following steps to define course waitlist defaults:

Step 1 - Familiarize yourself with the procedure for defining course waitlist defaults.

- See “Understanding Course Waitlist Defaults” at www.datatel.com.

Step 2 - Access the Course/Section Defaults (CDEF) screen.

Step 3 - In the Allow Course Waitlist field, enter Y if you want to allow a waitlist to be created for each new course after enrollment passes capacity. CDEF will be set to N in the merged environment.

- You can later override this default for individual courses or sections, if necessary.

Step 4 - In the Waitlist Code Default field, enter the name of the waitlist rating you want to use as a default rating for each new course waitlist. No Waitlist Code Default will be set up on the CDEF in the merged environment.

- You can later override this default for individual courses or sections, if necessary.
- The Waitlist Code must be set up on CWLR first.

Step 5 - Update the CDEF screen.

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Changing Course Numbers and Names

Responsibility: Central

Complete the following steps to change the number or name of a course:

Step 1 - Familiarize yourself with the process of changing course numbers and names.

- Read “Course Number and Name Changes”.
- If the course content is changing (for instance the course no longer meets the same degree audit or prerequisite requirements), do not change the subject and/or name. Create a new course with a new course ID.
- This procedure is for when there is not a change in course content.

Step 2 - Access the course record on the Course (CRSE) screen.

Step 3 – Enter the new information as approved by the BOR and/or VPs.

- If the subject is changing, go to the Subjects field and change the subject
 - Make sure the department is still accurate
- If the number is changing, go to the Course Number field and change the number
 - Make sure the course level is still accurate
- If the title is changing, go to the Long Title and Control –D, then go to the short title and enter the new title. The short title defaults into the long title.
- If credits are changing, go to the Min/Max/Incr field and change the credits
 - Make sure to change the billing credits also
 - If there are sections created in a future semester, the sections also need to be changed.
- If course description changes, go to the Description field, detail, and enter the new description.
- If location changes, go to the Locations field and Ctrl-D the location from the field.
 - If you are the only university offering the course, the course should be inactivated.
 - If there are sections created in future semesters, the sections should be deleted.
- To add your location to the course go to the Locations Field and add the approved university to the course.

Step 4 - Update the CRSE screen.

- Colleague stores the course record with the new course name: Course Subject/Delimiter/Course Number.
 - **Colleague does not change the Course ID in this instance.**
- See “Course Names and IDs” for more information about how Colleague constructs the Course Name.
- Note: See the “Courses: IDs versus Names (Release 14) document in the appendix for additional information on course ids.

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Deactivating a Course

Responsibility: Central

If your institution decides not to offer a course anymore, access the course record on the CRSE screen and change the status field to “inactive” and enter the corresponding approval agency (BOR or VP, etc).

Note: Only inactivate a course if you are the only location entered on the course. If not, only delete your location.

Note: Do not *delete* the inactive course record, since there still may be some academic requirements that reference it and since there may be students who reference the course in their academic records.

Step 1 – Access the Courses (CRSE) screen

Step 2 – At the Course LookUp, enter the name of the course to be inactivated.

- Select the course from the resolution screen.

Step 3 – In the Status field, enter I

- The end date defaults to today’s date.
- Change to the appropriate end of term date
 - Enter the last day of the term that this course can be offered

Step 4 – In the Appr Agency/Person field, enter the responsible party that approved the inactivation

- Enter the Board of Regents

Step 5 – Detail on the Course Sec field to view a listing of the terms this course was offered.

- If there are sections offered after the term of the inactivation, the sections need to be canceled.
- If you want to change the status for a section, access the section on the Sections (SECT) screen field and change the section’s status
- If you want to change the statuses of a group of sections, see “Changing Section Statuses”.

Step 6 – Detail on the Requisites field to the Course Requisites (CREQ) screen

- Make note of any co-requisites that may also need to be inactivated

Step 7 - Update the CRSE screen

South Dakota Colleague System Procedures

Changing Course Content/Copying an Existing Course

Responsibility: Central

Complete the following steps to significantly change course content or to copy an existing course:

Step 1 - Familiarize yourself with the process of changing course content.

- If the course content has changed (for example the course no longer meets the same degree audit or prerequisite requirements), it is recommended that you use a unique course number, with a new Course ID, for the new course.

Step 2 – Access the Course Copy (COCO) screen

Step 3 - At the Course LookUp prompt,

- enter the name (subject and number) for the old course
- or
- enter the name (subject and number) of an existing course similar to the one you are adding.

Note: If you enter just the subject, Colleague will give you a list of courses with that subject to select from.

Step 4 – In the New Course Subject and New Course Number fields, enter the subject and number of the new course.

Step 5 – Update the COCO screen

Step 6 – The Courses (CRSE) screen is displayed.

Step 7 - Finish defining the course

- See “Creating a Course from Scratch”

Step 8 – Update the CRSE -> COCO screens

- The new course is created with the new course content and course ID.

Step 9 – If the old course is inactivated, access the Courses (CRSE) screen

Step 10 - At the Course LookUp prompt, enter the subject and number for the old course.

Step 11 – Enter an End Date and Inactive Status.

Step 12 - Update the CRSE screen.

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Equating Courses

Responsibility: Central

Your institution may offer two or more courses that cover the same material but are titled and numbered differently. Each course may be substituted for the other to satisfy an academic program requirement or a course requisite. In Colleague, you use equate codes to identify courses as equivalent. You equate courses on the Course Equate Codes (EQCD) screen.

Note: The courses on an equate list must have the same repeat grade usage policy associated with their grade schemes. The repeat grade usage policy determines which grade to use if a student has retaken a course.

Step 1 – Access the Course Equate Codes (EQCD) screen by detailing from the Equate Code field on the Additional Information (ACOI) screen or accessing the EQCD screen from the menu.

Step 2 – At the Course Equate Code Lookup, enter the new code or ... to browse existing codes

- If entering a new code, enter A to add
 - Choose a name with no spaces limited to 15 characters
 - Use the SUBJ####*SUBJ### convention.
- If reviewing an existing code, pick the code from the resolution table

Step 3 – Enter/Review the Description for the code

- Include course names with reason
- For example: ART111*ARTS 111 Prefix chg

Step 4 – Enter/Review the courses associated with the equate

Note: Course equate codes affect both the registration process and the academic program evaluation process. When you register a student for a course, Colleague will compare the student's record to the course and to the courses listed on the EQCD screen to determine if the student has previously taken the course or an equivalent. When you use the Degree Audit module to perform an academic program evaluation, the evaluator checks each course on a student's record including the equated courses to determine if the program requirements have been met.

Step 5 – Update this screen

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Generating a Course Catalog

Responsibility: University

After you have defined your courses, you may want to produce a catalog for your students and instructors to use as a reference. You can choose to print the entire offering of courses or print smaller catalogs for each campus, school, division, department, or academic term. You can publish your catalog online or import the information into a word processor for manipulation before publishing.

Note: In Colleague, the word “catalog” has two separate meanings, both related to curriculum. In one definition, a catalog is a group of academic programs offered during a specific time period, typically an academic year. The other definition is a course catalog, discussed in this section.

Step 1 – Access the Course Catalog (CCAT) screen

Step 2 – Enter/Review Report instructions

- Define the format of the catalog
 - Report Line Length
 - Sort by Inst Hierarchy
 - Justify Credits Right
- Define the information to be included for each course
 - Print Credits/CEUs/Both
 - Print Session/Yearly Cycles
 - Print Contact Hours/Meth
 - Print Faculty Consent
 - Print Restrictions
 - Print Equate Codes
 - Print Requisites Last
- All of the report instructions fields are required

Step 3 – Enter/Review the Selection criteria

- *Run for your university only.*
- Define the courses you want to include in your course catalog by defining one or more of the following fields:
 - Saved List Name (from COURSES file)
 - Academic Levels
 - Schools
 - Divisions
 - Departments
 - Locations – It is required that you enter your university.
 - Subjects
 - Session Cycles
 - Yearly Cycles
 - Terms Offered

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Step 4 – Enter Additional Selection criteria, if desired

Step 5 – Update the screen

Step 6 – Enter the Output Device

- For example, HOLD file with Banner or P with a specific networked printer

South Dakota Colleague System Procedures

Generating a Course Waitlist Report

Responsibility: University

Complete the following steps to generate a report about course waitlists:

Step 1 - Familiarize yourself with the procedure for generating a course waitlist report.

Step 2 - Access the Course Waitlist (WAIT) screen.

- Enter the type of the phone number you want printed on this report
- Enter [Y] to print the student's academic program(s) on the report
- Enter [Y] to print the student's address on the report
- Enter the code for the Name/Address hierarchy

Step 3 - Select the criteria that describes the courses you want to process.

- **Select for your location (university) only.**
- Saved List Name w/Ids from WAIT.LIST file
- Waitlist Rating
 - You can limit the students included on this list by specifying a range of waitlist ratings. Enter the minimum rating here. Colleague selects only those students whose waitlist rating is greater than or equal to the value you enter.

- Courses
- Sections
- Terms
- Pref Locations

If you enter the name of a saved list and do not use any of the other selection options on the WAIT screen, then Colleague includes all courses in the saved list.

If you enter the name of a saved list and use any of the other selection options on the WAIT screen, then Colleague includes all

Step 4 - If you need to define additional criteria for selecting specific course sections, go to the Additional Selection Criteria field.

- Otherwise, continue with step 7.
- Selection is from the WAIT.LIST file

Step 5 - Enter Y and update the WAIT screen.

- The Additional Selection Criteria screen is displayed.

Step 6 - Complete the Additional Select Criteria screen.

Step 7 - Save the information on this screen.

- The Change Peripheral Defaults screen is displayed.

Step 8 - Accept the defaults or change the name of the default printer, select a different printer, or choose to have the reports sent to a hold file with a banner name.

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- The Phantom Mode Specification screen is displayed.

Step 9 - If you want this process to run in the background or phantom mode, complete the Phantom Mode Specification screen. Otherwise, leave this screen blank.

Step 10 - Update screen to begin the process.

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Generating a List of Courses

Responsibility: University

You can print or view a report of courses and course characteristics using the Course List (CRSL) screen

Step 1 – Access the Course List (CRSL) screen

Step 2 - In the top part of the screen, you can define the level of detail and organization of the report. Your choices are:

- **Summary report**—If you enter **Yes** in the Summary Format field, Colleague will print a summary report with just a few key pieces of information about each course. For this option, you must also enter values in the following fields:
 - Enter **Yes** in the Print Requisites field if you want to see course prerequisites and corequisites as part of the report. If you enter **No**, Colleague will not print requisites.
 - Enter **Yes** in the Sort by Institution Hierarchy field if you want the report sorted by school, division, and department. If you enter **No**, Colleague will list all of the courses in alphabetical order by course name.
- **Detailed report**—If you enter **No** in the Summary Format field, Colleague will print a detailed report about each course. For this option, the Print Requisites and Sort by Institution Hierarchy fields are not available.

Step 3 - In the bottom part of the screen, you can limit the course list to selected courses by specifying a saved list from the COURSES file and/or other limiting criteria. The other criteria include:

- Course Date
- Schools
- Divisions
- Departments
- Subjects
- Session Cycles
- Yearly Cycles.
- Terms Offered.

Step 4 – Enter Additional Selection Criteria, if desired

- For example, a listing of all common or unique courses by entering WITH CRS.COURSE.TYPES EQ 'COM' for common
- Select for your university only.

Step 5 – Enter the Output Device

- For example, the HOLD file with a banner name or a specific networked printer

Step 6 – Update the screen

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FACULTY

Adding a Faculty Member

Responsibility: University

Use the Faculty (FCTY) screen to add a faculty member. Refer to “Understanding Faculty Member Information” at www.datatel.com for more information.

Step 1 – Access the Faculty (FCTY) screen

Step 2 – At the person lookup prompt, enter the SSN of the person.

Note: Because duplicate records can cause serious problems for your institution, you must thoroughly search the database for an existing record for a person before you add a new record. Use Person LookUp and carefully follow search procedures for preventing duplicate records.

- If there is a person with that SSN, the FCTY screen for that person will appear.
 - Continue with Step 3
- If there is not a person with that SSN, enter the name of the faculty member to further clarify your search.
- If the last name brings up a resolution screen, check the birthdate and/or SSN to make sure it is the right person.

Identifying Duplicate Records

- How do you know if you have a duplicate record?
 - Compare the SSN
 - Is it the same?
 - Is it close? Have the numbers been transposed?
 - Compare the Last, First, Middle name
 - Is it the same?
 - Is it close? What is the nickname? What are the other names?
 - Compare the birth date
 - Is it the same?
 - Is it close? Have the numbers been transposed?
 - Compare the address, including the e-mail address
 - Is it the same?
 - Compare the phone number
 - Is it the same?
 - Compare the high school graduation date
 - Is it the same?
 - Compare the academic history
 - Is it the same?
- If one or more of the above are the same – **STOP**
 - Provide the information that leads you to believe you have a duplicate record to the universities involved
 - Do Not process the record any further

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- The universities will continue with Step 2 in the Duplicate Record Cleanup Procedures
- If you have exhausted the entire look up options, enter A to add.
- Define the following information on the Name and Address Entry (NAE) screen

Enter/verify the last name, first name, middle name and any suffix the person has indicated.

Legal Name

- In the order of Last Name, First Name and Middle Name if the student has provided the information.
 - Add nicknames in the Nickname field on BIO which you can access from NAE by detailing on the Last Name field.
- Enter the names exactly as they appear on the contact card.
- Use the punctuation documentation if a name has a hyphen or apostrophe and you are not sure of the correct way to enter the name.
 - If a student has two or more capital letters in their last name (McDonald), instead of typing Mc_Donald, type =McDonald.
 - Using an equal sign guarantees the name will save exactly as you typed it.
 - This will overwrite Colleague's capitalization rules.

Suffix

- Enter only if the student lists a suffix at the end of their name
 - Ex. Jr, Sr, III.
- Otherwise leave this field blank.

Enter the institutional address and type

Note: If you are changing an existing address or are entering multiple addresses, use the ADR screen.

- Enter the institutional (INS) address
 - Enter the street address
 - Do not enter the street address and box number on the same line.
 - Do not use punctuation when entering the address.
 - Use only 2 lines for the street address.
 - **Enter the zip code (excluding foreign zips except for Canada & Mexico)**
 - Enter the Zip code in the City element and city and state will automatically be filled. Check the city/state/zip information that's returned for validity.
 - If no information is returned for zip code, enter city name in City, the State code and the Zip code. Verify correct spelling of city name when adding.
 - Detailing allows for storing multiple addresses. (See Adding/Changing an Address in Core).

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- If this is the only address, Colleague sets the preferred mailing and address flags to 'Yes'. If this is not the only address, detail on the Addresses field to the Person Addresses (ADR) screen and set the Mail Pref & Pref Res to Y on the INS address.

Enter the Residence county and state code

Use the "legal address" (permanent address) as the source for completing the State/County of Origin. The resident county and state fields (#6) on NAE and the residence state and residence county fields on DADD (#9 & #10) are the same fields.

Entry of residency information at the time of initial application:

- Enter the residence state code using the permanent address as the source.
- Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
- These fields are used to retain the original residency information for a student.
- The residency status on the application (APPN) should match the residence state i.e. 'R' Resident if SD and 'N' if other than a SD resident.

Note: Students can be in the military service without being a US citizen. The coding for non US citizens in the military is residence state of AA and Residence country of US to be valid with an alien status of Y and F1 immigration status.

Entry of residence information for subsequent applications:

- If the student did not attend any regental university as a result of the initial application:
 - Enter the residence state code using the permanent address as the source.
 - Enter the residence county only if the applicant is a SD resident using the permanent address as the source.
 - If the student did attend any regental university and is now returning after an absence, do not change the residence state code on NAE or DADD. If the student is becoming a SD resident, the county field will need to be updated with the SD county.
- Instead, if the new state code is different than the original residence state, enter the new state in the person origin field on NAE using the permanent address as the source. Do not change the origin county unless this student is becoming a resident and there was not a SD county listed.
- The residency status on the application (APPN) and (ASPR) should match the state recorded in the person origin field. IF that is blank, then, the residency status should match the state recorded in the residence state field.

The IPEDs definition is as follows:

State of residence - Use the state identified by the student as his/her permanent address at the time of application to the institution. This may be the legal residence of a parent or guardian, or the state in which a student has a driver's license or is registered to vote. It is not necessarily the state in which the student's high school is located.

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Enter the phone number, extension and type

- Enter the phone number including area code.
- Do not use any dashes or parenthesis,
 - Ex. 6056262544 would be an accurate way to enter the phone number
- Only use the extension field if an extension is given (rarely)
 - Enter I for the type of phone number.

Enter the social security number

- Enter the social security number if it is available.
- You do not need to add any dashes as Colleague will automatically add the dashes for you.
- If the SSN on the information differs from the SSN in Colleague, do not update at this time. A letter will be sent requesting a photocopy of the SSN Card.
- If the SSN matches another in Colleague a pop up box will appear with the Colleague ID and name of the person that number is assigned to.

Enter the birth date

- Enter the birth date without slashes
 - Ex. 031369.
 - If the month or day is 9 or less, add a zero to the front of the number.
 - Colleague will format the birth date as MM/DD/YYYY.
 - If prior to 1930, all four digits of the year must be typed

Enter/Verify the Ethnic/Gender Codes

This information must be entered to avoid errors in the extract.

- Enter the ethnicity code
 - Type ‘...’ to get a list of all the possible ethnic choices.
 - If ethnic information is not provided, use the (UN) Unknown code.
 - If “do not wish to respond” is marked, use the ethnic code (IR) Information Refused.
- Enter the gender code
 - Gender is an ‘F’ for female and ‘M’ for Male.
 - Also, if the gender is obvious from the first and middle names, you can use that information to record gender if it is not listed.
 - Gender may be found on transcripts submitted with the employment application.

Enter the e-mail address if available

- Enter the faculty member’s e-mail address type(s) and e-mail Address(es) using punctuation
- Enter the type as PRI

Enter the preferred name, mail name and other LFM name field

- Preferred name

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- Automatically defaults to the name originally entered into Colleague.
 - If the preferred name was changed through a name change, the new name will not default in. This will need to manually need to be changed to reflect the name change.
- Enter the preferred name only if it differs from the full legal name.
 - An example of this would be if a person's given name was Theodore James but they go by TJ.
- Mail name
 - Automatically defaults to the name originally entered into Colleague.
 - Only used if someone gives us a preferred mailing name.
- Other LFM
 - If provided, enter the nicknames in the Nickname field on BIO, which you can access, from NAE by detailing on the Last Name field.
 - List every other or former name the applicant has ever used to reduce the chances of duplicates in the Other LFM field
 -

Enter an address source and date

- Audit trail of who made changes and when.
- Required field if changes are made.
 - When an address is changed on ADR, a prompt to retain address history and an address change source will display. Retain address history and use the appropriate address change source. For example, if the source of the new address is the application, use Application (APP), use Student (STU) if the source is from the student directly via email or verbal etc. Use correction (COR) only when there is a genuine mistake that needs to be corrected.

Update the NAE screen

Step 3 – Enter the Department/Pct/Division/School

- Lookup the smart coded department codes by entering the university identifier and ... at the prompt.
- Select the appropriate department.
- Pct is the percentage the faculty member is assigned to that department. Generally, that should equal 100%. If it is less than 100%, the total MUST add up to 100%. Put additional assignments on separate lines.
- Division/School Defaults from Department selection.

Step 4 – Enter the Position

Step 5 – Enter the Rank

- Enter 3 (Teaching Assistants) for graduate assistants
 - This is required for accurate reporting to the SD Library Network

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Step 6 – Enter the Location

- Enter the specific university this faculty is teaching for

Step 7 – Enter Max Workload/Start Date

- The Max Workload will generally be 12.0 semester hours.
- Start Date is always 8/15 of the year the faculty member came to the university.
- Skip the end date.

Step 8 – Enter Advisor

- The default is NO.
- It must be changed to a YES unless the faculty member DOES NOT have any advisees.

Step 9 – Enter Max Advisees

- Set according to School/Dept Standards

Step 10– Update the FCTY screen

Deleting a faculty member entered in error

Step 1 – Access the Faculty Section Assignment (FASC) screen for every section that has the wrong faculty members name/ID on it

Step 2 – Delete the wrong faculty member

Step 3 – Add the right faculty member to all FASC records

Step 4 – Notify RIS to delete the Faculty (FCTY) record for the wrong faculty member (if they are not faculty at all)

Ending a faculty member's record when they are no longer employed

Step 1 – Access the Faculty (FCTY) screen for the faculty member

Step 2 – Enter NE in the Position field

Step 3 – Update the FCTY screen

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Making an Instructional Assignment

Responsibility: Home

This section provides procedures for creating a faculty instructional assignment: Complete the following steps to assign a faculty member to every course section. This procedure assumes you are not using the Human Resources application and the instruction assignment is independent of an HR contract.

Note: A faculty member should be assigned to every course section (primary and secondary) to facilitate reporting.

Step 1 - Familiarize yourself with the procedure for assigning a faculty member to a course section.

- Read “Understanding Faculty Instructional Assignments”.

Step 2 - Access the course section you want to assign faculty to using the Faculty Section Assignment (FASC) screen

- You can access the FASC screen from either the menu or by detailing from the Course Section (SECT) screen.
- Use standard LookUp procedures to locate the appropriate course section.
 - To look up sections for your university, enter the term, course name, and your university identifier plus ... (i.e. 2003FA ENGL 101 S...).

Step 3 - Enter the name of the faculty member you want to assign to the course section at the Faculty LookUp or (Q) for Qualified prompt.

Note: To enter faculty information onto Colleague begin by doing a thorough records search. If a faculty member is not in the system, he/she will have to be added using the NAE procedures. If the person is in the system but you can't add them as a faculty member, see the Procedures for Adding a Faculty Member.

- See *Defining a Faculty Member's Qualifications* for more information about defining and using faculty qualifications.
- Colleague displays a warning message if no qualification records exist for the faculty member you enter. If this is of no concern to you, return through the message.
- Colleague defaults the following values from the course definition:
 - Start/end dates
 - Instructional method(s)
 - Workload
 - Contact hours
 - You can modify any of the defaulting values, if necessary.
 - For instance, if this was a non-standard course, the dates should be modified to match the start/end dates of the section
 - If this is a common course with multiple instructional methods, the first one listed on COFF populates after the faculty member but

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both populate in the Section Instr Method field. These may need to be changed.

Step 4 - If you want to add another instructor to this course section, repeat this procedure beginning with step 3.

- The percentage should be adjusted accordingly.
 - Ie. – 50/50, 75/25, etc
- When sections are cross-listed, the percentage also needs to be adjusted.

Step 5 – Enter Fac Comm Cd/Stat or Stu Comm Cd/Stat

- CC can notify faculty and students if the faculty assignment changes

Step 6 - Save this course section record.

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Defining a Faculty Member's Office Hours

Responsibility: University

Use the Faculty Office Hours (FAOH) screen to enter a faculty member's office hours.

Step 1 – Access the Faculty Office Hours (FAOH) screen

Step 2 – At the Faculty LookUp prompt, enter the ID or full name of the faculty member

Step 3 – In the Start Date field, enter the start date of the office hours

Note: If the dates are semester based, you can enter the semester (2003FA) in the start date and the start and end dates will populate with the semester dates.

Step 4 – In the End Date field, enter the end date of the office hours

Step 5 – Enter the Bldg and Room for the office hours

Step 6 – Enter the Start/End time for the office hours

Step 7 – Enter the Days of the Week and frequency for the office hours

- For example, M for Monday and W for weekly

Step 8 – Enter Y in Rebuild Office Dates to check for conflicts

Step 9 – Update the FAOH screen

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Viewing a Faculty Member's Schedule

Responsibility: University

Use the Faculty Schedule Inquiry (FCSI) screen to view a faculty member's schedule including office hours.

Step 1 – Access the Faculty Schedule Inquiry (FCSI) screen

Step 2 – At the faculty lookup prompt, enter the ID and full name of the faculty

Step 3 – The Faculty Teaching Schedule is displayed

Viewing a Faculty Member's Office Hours

You can use either the Faculty Schedule Inquiry (FCSI) screen or the Faculty Office Hours (FAOH) screen to view a faculty member's office hours.

Step 1 – Access the Faculty Schedule Inquiry (FCSI) screen

Step 2 – At the faculty lookup prompt, enter the ID or full name of the faculty

Step 3 – The Faculty Office Hours are displayed

Note – If the faculty member has not defined their hours on the Faculty Office Hours (FAOH) screen, nothing will display.

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Defining a Faculty Member's Qualifications

Responsibility: University

Use the Faculty Qualifications (FQAL) screen to define a faculty member's qualifications.

Refer to "Understanding Faculty Qualifications" at www.datatel.com.

Understanding Faculty Qualifications

Minimum qualifications needed are undergraduate or graduate. Undergraduate will be entered on all faculty in the third merge pass and universities will need to edit and change or add levels.

- Use the Faculty Qualifications (FQAL) screen to maintain information about a faculty member's qualifications, including academic levels, departments, subject areas, courses, and course levels the individual is eligible to teach.
- You can access the FQAL screen from the menu level, or by detailing from the Qualifications field on the Faculty (FCTY) screen.
- The information you enter in the Academic Levels, Department, Subject, Courses, and Course Levels fields are used to validate and restrict the course sections a faculty member can teach.
 - When entering qualifications, you can list general qualifications, or you can list specific subjects or courses.
 - If you enter specific courses or committees, you can define the start and end dates when the qualifications are valid.
 - If you enter specific courses or committees, you can define the start and end dates when the qualifications are valid.
 - For each qualification entry, the more information you enter, the more restrictive the qualifications.
 - In other words, to define a faculty member's qualifications more generally, you might list a specific academic level and department.
 - To define a faculty member's qualifications more specifically, you would list specific courses.

For more information about assigning faculty members to sections, see "Making Instructional Assignments".

Recording Qualifications

- The Academic Level field is the key field on the FQAL screen, followed by Department, then by Subject, then by Courses.
 - In this way you can determine how broadly or narrowly to define the individual qualifications for each faculty member.

Note: If the faculty member is qualified to teach in more than one department at the same academic level, you must make separate entries for each department. Likewise, if the faculty member is qualified to teach several subject areas within a department and

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academic level, you should enter every possible combination of academic level, department, and subject area.

Example. Below is a display of the qualifications information for Prof. Kelsey Dylan. Professor Dylan's qualifications are as follows:

- qualified at the undergraduate level:
- to teach in the English and Psychology departments
- to teach History department courses *only* in American History
- qualified to teach any graduate level course in American History in the History department
- qualified to teach CS-101, Logic, in the Computer Science department

Note: Professor Dylan's qualifications indicate that, in addition to her English, History, and Psychology department qualifications, she is also qualified to teach CS-101, Logic. As the specific course listing in the Courses field shows, Professor Dylan is qualified to teach *only* one course in the Computer Science department, CS-101 (this limitation has no effect on the English, History, and Psychology department listings).

Note: Faculty must be "qualified" to teach courses in Colleague or each time a course is added to an "unqualified" faculty member, the operator will receive an error message.

Step 1 – Access the Faculty Qualifications (FQAL) screen from the mail menu or detailing from the Faculty (FCTY) screen for the faculty member

Step 2 – Enter Academic Levels

- At the Academic Levels LookUp , enter UG.
 - Usually, all faculty are qualified to teach at the undergraduate level.
- Only **GRADUATE FACULTY** can teach Graduate Courses.
 - If the faculty member is a member of the Graduate Faculty (see the graduate office) then enter graduate level.
- Only **LAW FACULTY** can teach Law Courses.
 - If the faculty member is a member of the Law Faculty (see the Law office) then enter Law level.
- Only **MEDICAL FACULTY** can teach Medical Courses.
 - If the faculty member is a member of the Medical Faculty (see the Medical office) then enter Medical level.

Step 3 – Enter the Location

- Enter the university location this faculty can teach at

Step 4 - Update the FQAL screen

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Cross-Referencing Faculty Qualifications

Responsibility: University

You can run the Qualified Faculty Cross-Ref (QFXR) batch process to consolidate all faculty qualification information.

Step 1 – Access the Qualified Faculty Cross-Ref (QXFR) screen

Step 2 – Define the following fields

- Saved List Name
 - This savedlist needs to contain a list of IDs of records from the COURSES file. Limit to your university.
- Clear File
 - After you run this process, the results are saved in the FACULTY.QUALS.XREF file. If you want to save the results of a previous query, enter [N].
- Course Dates
 - Colleague selects any courses for which the start date is greater than or equal to this date if the courses meet the other selection criteria entered.
- You can enter information in the following fields for courses you want to use for the qualifications cross-reference, or use these fields with the saved list to further narrow the selection. For example, if you enter a saved list and the code for "Active," Colleague runs the qualifications cross-reference process against the saved list and finds the faculty members qualified to teach the courses in the saved list that have an "active" status.
 - Statuses
 - Credit Types
 - Session Cycles
 - Yearly Cycles
 - Terms
 - Acad Levels
 - Depts Incl/Excl
 - Subjects Incl/Excl
 - Additional Selection Criteria from the COURSES file

Step 3 – Update the QXFR screen

Step 4 - View the results on the Faculty Qual Cross-Ref List (FQXI) screen.

Running the Advisor Assignment Batch Process

Responsibility: Home

Use the Advisor Assignment (ADAS) screen to run the advisor assignment batch process.

Step 1 – Access the Advisor Assignment (ADAS) screen

Step 2 – Define the following fields

Define the action you want to take and the advisor:

Assign/Unassign/Reassign

- You can assign, unassign, or reassign a faculty member as an advisor

Original Advisor

- Enter the name of the original advisor if you are reassigning or unassigning an advisor to a student

New Advisor, Start/Edn Date, Type

- Enter the name of the new advisor
- Enter the date on which the new advisor assignment begins
- Enter the date on which the new advisor assignment ends
- Enter an Advisor Type

Use Rules

- Enter [Y] to use rules for advisor assignment

Define the students:

Saved List Name

- Enter the name of the saved list that includes the Colleague ID of the student. Select students for your university only.

Acad Levels/Programs/Classes

- Enter the academic level of the new advisees to be selected
- Enter the smartcoded academic program of students selected in the saved list
- Enter the class of students you want included as selection criteria

Departments, Divisions or Schools Included/Excluded

- Enter the smartcoded departments, Divisions or schools you want to include/exclude as selection criteria

Federal/Other Cohort Groups

- Enter the federal cohort/other cohort group as selection or refining criteria

Addnl Sel Criteria

- Enter any additional selection criteria

Step 3 – Update the ADAS screen

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Deactivating an Advisee

Responsibility: Home

You can deactivate an advisee by entering an advising end date.

After deactivating an advisee on the FADT screen, you will only be able to access the former advisee's record from the Former Advisees (FASS) screen.

Note: Students in degree seeking programs that do not return to any university in the system or change their degree seeking status to a different university, will have their program and advisor inactivated (Use program status of "I") after the census date, and prior to the Census Day Enrollment Extract, of each Fall and Spring.

Student PROGRAM.STATUSES that will be used are:

- "I" will be used when students in degree seeking programs do not return to any university in the system or change their degree seeking status to a different university.
- "C" will be used when students make a program change at the same university during the semester
- "W" will be used when students go through the formal withdrawal process

Step 1 – Access the Student Advisor Listing (STAD) screen

Step 2 – At the person lookup prompt, enter the ID of the advisee

- Detail on the advisor you will be deactivating

Step 3 – The Faculty Advisee Detail (FADT) screen will display

Step 4 – Enter an End Date

Step 5 – Update the FADT -> STAD

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Viewing a Faculty Member's Workload

Responsibility: Home

Use the Faculty Workload (FWKL) screen to view a faculty member's workload.

Step 1 – Access the Faculty Workload (FWKL) screen

Step 2 – At the faculty lookup prompt, enter the ID or full name of the faculty member

Step 3 – Enter a Start Date for the inquiry

Step 4 – The Instructional Workload is displayed if the faculty member is teaching during the dates entered in Step 3

Step 5 – If the faculty has any non-instructional workload such as an advisor to a campus organization, that will also display

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Running a Report on Faculty Workload

Responsibility: University

Timeframe: Prior to enrollment reporting

Complete the following steps to run a faculty workload report:

Step 1 - Familiarize yourself with the concept of faculty workloads.

- See “Understanding Faculty Workload” at www.datatel.com.

Step 2 - Access the Faculty Workload (FWLR) screen.

Step 3 - Enter values to define:

- the date range to include in this report
 - If you enter a term, it pulls in the term dates
- whether the report is to be summarized or detailed
- the sort order

Step 4 - Select the criteria that describes the faculty you want to report on.

- Saved List Name – Select only for your university
 - You can choose the faculty members to include on this report by entering the name of a saved list of IDs from the FACULTY file.

- Departments Incl/Excl
- Divisions Incl/Excl
- Schools
- Home Locations
- Faculty Members

If you enter the name of a saved list and do not use any of the other selection options on the FWLR screen, then Colleague includes all of the faculty members in the saved list.

If you enter the name of a saved list and use any of the other selection criteria on the FWLR screen, then Colleague includes all of the faculty members in the saved list that meet the other selection criteria identified.

Step 5 - If you need to define additional criteria for selecting specific course sections, go to the Additional Selection Criteria field.

- Otherwise, continue with step 8.

Step 6 - Enter Y and update the FWLR screen.

- The Additional Selection Criteria screen is displayed.

Step 7 - Complete the Additional Select Criteria screen.

Step 8 - Save the information on this screen.

- The Phantom Mode Specification screen is displayed.

Step 9 - If you want this process to run in phantom or background mode, complete the Phantom Mode Specification screen; otherwise, leave this screen blank.

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Step 10 - Update the FWLR screen to start the process that prints the workload report.

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Assigning an Advisee to a Faculty Member

Responsibility: Home

Complete the following steps to assign a faculty member as an advisor:

Step 1 - Review “Understanding Faculty Member/Advisee Associations” provided at www.datatel.com

Step 2 - Access the Faculty Advisees (FADV) screen.

Step 3 – At the Faculty LookUp prompt, enter the SSN or full name of the faculty advisor

- The cursor is in the first line of the Advisees group.

Step 4 - To add an advisee, move to the first blank line.

- The cursor is at the Advisee LookUp prompt.

Step 5 - Enter the student’s name or ID.

- Colleague displays the Faculty Advisees Detail (FADT) screen.

Step 6 – Define the following fields

Start Date – the date the student was assigned to the advisor; this must be at least the start date of the program

Type – Enter the type of advisor the person is to the student

For example, 1st Advisor, Retention, Education

Smartcoded Acad Program – Enter x... (where x is the university identifier) to determine the appropriate program; if no program shows, check the start date of the program on SPRO

- An advisee must be assigned to a program. Then at the time of graduation, the processor will end the adviser assignment.

Step 7 - Update the record on the FADT screen.

- The FADV screen redisplay with the cursor in the next blank line of the Advisees group.

Step 8 - To add additional advisees, repeat this procedure beginning with step 4.

- If you are finished entering advisees, finish from the FADV screen.

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Generating a List of Advisees for a Faculty Member

Responsibility: Home

Use the Faculty Advisee Report (FAVR) screen to run a faculty advisee report.

Step 1 – Access the Faculty Advisee Report (FAVR) screen

Step 2 – Define the following parameter fields

Sort by Advisor – Enter Y to sort and group students by advisor(s)

Print Term Info – Enter Y to print term info; if you enter N, all terms are displayed

Step 3 – Define the Advisees by entering the following

Saved List Name

- Use the IDs from the STUDENT.ADVISEMENT records

Advising Dates

- Enter the beginning or ending dates of the advisements to be included

Terms

- Terms entered here will be used to show detailed student term info if Print Term Info is "Y".
- If no terms are entered here and Print Term Info is "Y", all of a student's terms will display.

Advisors

Students

Acad Programs - smartcoded

Acad Levels

Additional Selection Criteria

- If you do not use a Savedlist, you may want to include location in this field.

Enter a limiting list of information in Advisors, Students, Acad Programs and Acad Levels If no info is entered here, all info is reported

Step 4 – Update the FAVR screen

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SECTIONS

Creating a Section from a Course

Responsibility: Home

Note: When sections are collaborative, each campus will set up its own section and the sections will be cross-listed.

A section must always be listed in the term in which the section begins. The fall semester ends 12/31 and the spring semester begins 01/01. An interim section would be considered a non-standard section and should have the actual dates of the section entered. Internal dates, such as Reg dates, must be adjusted on SRGD, field 1-7.

Note: The campus calendar and term dates (RYAT) need to be entered before entering sections. These have been set up centrally and have been secured.

To create a section by detailing from the Courses screen:

Step 1 - On the Courses (CRSE) screen, access the course for which you want to create a section.

Step 2 - Detail from the Course Sec field.

- Colleague will display a list of existing sections (if sections have already been defined for the course).

Step 3 - Select the “Add” option to create a section.

- Colleague will display the Sections (SECT) screen.
- See procedures below

To create a section by accessing the Sections (SECT) screen:

Step 1 - Access the Section (SECT) screen.

Step 2 - At the Course Section LookUp prompt, enter the name of the course for which you want to create a section.

Step 3 - Select the “Add” option to create a section.

- If there are multiple sections already created, a resolution screen will display.
- If you only need to change information on one section, pick it from the resolution screen.
- If you need to add a new section, enter A.

Step 4 - In the Section field, enter a section number for the section you are creating.

- In the merged environment, Section Number will contain a university identifier. The Section Number appears on WebAdvisor and on many reports. This will assist personnel in easily identifying what university is giving credit for the section.
 - Examples are S01, D01, B01, U01, N01 & M01
 - Section Numbers with x9...T (where x is the university ID) are reserved for term based correspondence courses

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- Section Numbers with x9...N (where x is the university ID) are reserved for non-term based correspondence courses
- Section Numbers with x8...T (where x is the university ID) are reserved for term based asynchronous internet courses
- Section Numbers with x8...N (where x is the university ID) are reserved for non-term based asynchronous internet courses
- Be careful when you access this field that you do not overwrite the smartcoded section number. Your university should do periodic edits to ensure this field is smartcoded.

Note: If the section number is changed after the section has student registrations, the section number must also be changed on SACD (by detailing on STAC for the section) for all registrations.

Step 5 – Enter the Term

- Enter yyyyFA, yyyySP, or yyyySU

Step 6 – Enter/Review Start/End Dates

- Will default from the term.
- CHANGE these dates to reflect any non-standard offering. (Example: block courses, SPED 435, any compressed courses, etc.)
- Do NOT change dates to reflect a late start date that results from holidays, etc (e.g. Monday night classes in the fall).
 - Effective F05, the start date for classes for Fall and Spring terms will be Registration/Orientation Day.
 - No matter what day of the week Registration/Orientation/Start Date is on, classes for that day of the week scheduled for 4:00 PM or later begin at 4:00 PM.
- Correspondence courses **will** have actual lengths of 175 days or 350 days. AAC suggested 120 days for purposes of refund in order to provide the same amount of time for refunds for all correspondence courses and thus facilitate automation of refunds. Correspondence courses may also be a standard term.
 - In order to comply with academic grade and date requirements, correspondence sections will have to be set-up for individual or groups of individuals according to the registration dates of the student. The start date on the section will be the day the student(s) register for the section. The end date will be either 175 or 350 days later depending on the length of the section. If students preregister for correspondence sections in which the start date will be the first date of the term, these students can be included in one section with the start date as the first day of the term.

Step 7 – Synonym

- Assigned by Colleague
- Never change the Colleague assigned number – if you do, you may create duplicate synonym numbers across the universities or within your own university.

Step 8 – Review Depts/Pct

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- Defaults from the course on unique courses.
- For common courses, enter the appropriate department for the section.
- Change the percentage accordingly for your university – typically this is 100 percent.

Step 9 – Review the Credit Type

- Defaults from the course
- Do not change this field.

Note: During the merge all sections prior to Fall 2003 will be identified with a smartcoded credit type.

Step 10 – Edit/Review the Min/Max Cred & Increment

- If the unique course is variable credit, but the section is not, indicate the number of hours for this section in the Min element.
- If the section is variable, the Increment field controls the increment of credit the student can register for.
- If this is a variable credit common course enter the range of credits (or specific credit) approved for your university.

Step 11 – Review the Course Lvls

- Defaults from the course
- Do not change this field.

Step 12 – Review the Acad Lvl

- Defaults from the course
- Do not change this field.

Step 13 – Review the Grade Scheme

- Defaults from the course
- Do not change this field.

Note: During the merge all sections prior to Fall 2003 will be identified with the smartcoded grade scheme.

Step 14 – Edit/Review the Short Title

- Will default from course record
- Titles on the courses were changed to the titles indicated below for x90, x91, x92, x93, x94, x95, x96, x97, and 498. These titles may be changed at the section level as long as the basic title (as listed below) is incorporated into the section title (i.e. Sem-English Lit; Ind Sty-Art History; Tp-French Culture; Wk-Educational Phil; etc.)

x90	Seminar
x91	Independent Study
x92	Topics
x93	Workshop

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x94	Internship
x95	Practicum
x96	Field Experience
x97	Cooperative Education
498	Undergraduate Research/Scholarship

- For other courses, titles have been approved by the BOR and must not be changed.

Step 15 – Edit/Review the Status

- Defaults to Active
- Can be changed to reflect the appropriate section status
- If a university does not want a future term to be available for registration they must enter (or copy using the SBSC screen) a status of “P” Pending on all sections for that term. These sections will not be available on WebAdvisor for “Search for Classes” nor will they be available for registration. At the time the sections should be available for registration, the status must be changed to “A” Active.

Step 16 – Review the National ID

- Defaults from the course
- Do not change this field.

Step 17 – Review/Edit the Local IDs

- Defaults from the course
- Can be changed to reflect the appropriate delivery method of the section
- For example – 018 Internet synchronous
- See the procedure *Defining Distance Education and Collaborative Sections* in this manual

Step 18 – Review Location

- Defaults from the course
- For common courses, no locations from the common course will default.
 - Entering the appropriate location is critical for registration and fee assessment and collection.
 - Colleague will only permit the entry of a location that exists at the course level.

Step 19 – Edit/Review Course Types

- Defaults from the course
- Can be changed to reflect the appropriate course type for the section
- COM/UNQ and Gen Ed course types must not be changed at the section level
- Eff S07, OSSPF was approved for BOR approved P/F SDOS eligible courses

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- OSSPF is added to the section when the approved course is only approved SDOS P/F for a particular university; OSCBA is added to the course when the approved SDOS P/F course is approved for all universities
- For example – HON for Honors or EPE for Petition Exemption on 7/10 ruling

Step 20 – Edit/Review the Topic Code

- Enter the specific location for this section – ex. USDSU, Pierre, etc.
 - This will aide in WA lookups for specific location sections.
- Enter AD – Alternate Delivery if there is not a physical location listed – ex. Mission DDN or Beresford HS, etc.
- Both term based and non-term based correspondence courses should be coded with “CC” Correspondence.
- Both term based and non-term based internet asynchronous courses should be coded with “INT” Internet.
- **To complete a Restricted lookup by Topic Code**
 - At the resolution screen, enter S to select sections by Topic Code (or another value on the section)
 - At the SSELECT COURSE.SECTIONS BY @ID: prompt, enter the selection criteria
 - For example, WITH SEC.TOPIC.CODE EQ 'USDSU' will bring back the sections only offered at SDPURC

Step 21 – Update the SECT screen and continue with Making an Instructional Assignment

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Making an Instructional Assignment

Responsibility: Home

This section provides procedures for creating a faculty instructional assignment: Complete the following steps to assign a faculty member to every course section. This procedure assumes you are not using the Human Resources application and the instruction assignment is independent of an HR contract.

Note: A faculty member should be assigned to every course section (primary and secondary) to facilitate reporting.

Step 1 - Familiarize yourself with the procedure for assigning a faculty member to a course section.

- Read “Understanding Faculty Instructional Assignments”.

Step 2 - Access the course section you want to assign faculty to using the Faculty Section Assignment (FASC) screen

- You can access the FASC screen from either the menu or by detailing from the Course Section (SECT) screen.
- Use standard LookUp procedures to locate the appropriate course section.
 - To look up sections for your university, enter the term, course name, and your university identifier plus ... (i.e. 2003FA ENGL 101 S...).

Step 3 - Enter the name of the faculty member you want to assign to the course section at the Faculty LookUp or (Q) for Qualified prompt.

Note: To enter faculty information onto Colleague begin by doing a thorough records search. If a faculty member is not in the system, he/she will have to be added using the NAE procedures. If the person is in the system but you can't add them as a faculty member, see the Procedures for Adding a Faculty Member.

- See *Defining a Faculty Member's Qualifications* for more information about defining and using faculty qualifications.
- Colleague displays a warning message if no qualification records exist for the faculty member you enter. If this is of no concern to you, return through the message. To prevent this all faculty will be assigned a minimum qualification of undergraduate which will be edited by the universities.
- Colleague defaults the following values from the course definition:
 - Start/end dates
 - Instructional method(s)
 - Workload
 - Contact hours
 - You can modify any of the defaulting values, if necessary.
 - For instance, if this was a non-standard course, the dates should be modified to match the start/end dates of the section

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- If this is a common course with multiple instructional methods, the first one listed on COFF populates after the faculty member but both populate in the Section Instr Method field. These may need to be changed.
- Each section must have only one instructional method as approved by AAC for your university. If there are multiple instructional methods, the one(s) in error should be removed.

Step 4 - If you want to add another instructor to this course section, repeat this procedure beginning with step 3.

- The percentage should be adjusted accordingly.
 - Ie. – 50/50, 75/25, etc
- When sections are cross-listed, the percentage also needs to be adjusted.

Step 5 – Enter Fac Comm Cd/Stat or Stu Comm Cd/Stat

- CC can notify faculty and students if the faculty assignment changes

Step 6 - Save this course section record.

Scheduling a Section

Responsibility: Home

Complete the following steps to schedule a course section:

Step 1 - Familiarize yourself with the procedure for scheduling a course section.

- See “Understanding Section Scheduling”.

Step 2 - Access the course section record on the Section Offering Info (SOFF) screen by detailing from the Offering Info field in SECT or from the main menu

Step 3 – If this section is created from a common course with multiple instructional methods, all will populate here.

- Delete the incorrect instructional method.

Step 3 - Go to the Schedule Print Times group and enter the following information for the section:

- Instructional Method defaults in on the first line; if the offering information is listed on more than one line, the instructional method needs to be entered first
- Building and Room – enter the smart coded building and room
 - Common buildings such as COFC for off campus and SFCE or FHSC for SDPURC have been set up
 - Rooms for COFC will be the actual location of the section
 - For instance, BereHS for Beresford High School, INTERNET for Internet or CORRCRED for Correspondence Credit
 - Rooms for SFCE & HFSC should be the specific room the section is in.
 - If the room is not known when the section is built, the building should be SFCE and the room SDPURC.
 - If the building/room is set up SFCE SDPURC, the specific room number needs to be entered prior to facilities reporting.
 - In the case of SETI rooms, the building should be COFC and the room SFSTI.
 - In the case of DDN sections, if the section is in a room at SDPURC, the building should be SFCE or FHSC and the room should be the specific room.
 - If the DDN room is on the SETI facilities, the building should be COFC & the room SFSTI.
 - Until the actual room location for DDN sections other than SF is known, enter DDN for the bldg and DDN for the room
- Start and End Times – enter the start and end times of the section
- Days of the Week – enter the days of the week the section meets

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- Effective F05, classes that meet only once per week can be scheduled on Mondays only if they meet one of the following criteria:
 - Begin no earlier than 4:00 PM, or
 - Are lab sections associated with lecture classes that will meet Tuesday, Wednesday, Thursday, or Friday each week.
 - The VPAA may make exceptions as long as an alternate meeting date is established prior to Census Date.
- Start and End Dates - if this is a non-standard semester section, change the dates to match the start and end dates of the section
 - Effective F05, the start date for classes for Fall and Spring terms will be Registration/Orientation Day.
 - No matter what day of the week Registration/Orientation/Start Date is on, classes for that day of the week scheduled for 4:00 PM or later begin at 4:00 PM.
- Meeting Frequency – enter the frequency of the meeting days

Note: Colleague prints this information on student and facility schedules.

Note: Colleague uses this information to build the schedule records that are used during all schedule checking.

Step 4 - If you want to create schedule records for this section, go to the Rebuild Meeting Dates field and enter Yes.

- Enter Yes to rebuild meeting dates as they are built in order to determine scheduling conflicts for rooms.
- If you do not create schedule records for the individual section, remember to launch the Rebuild Section Meeting Dates (RSMD) process.
 - For more information about RSMD, see “Rebuilding Section Meeting Dates”.

Step 5 - If you want to adjust the actual meeting times, detail to the Section Schedule Detail (SESC) screen from the Actual Meeting Times field.

- Otherwise, go to step 7.
- Colleague displays the Section Schedule Detail (SESC) screen.
 - If the dates of the section are random throughout the semester, you can add/delete days here.

Step 6 - Change the individual records to match actual meeting times for this course section.

Step 7 – Enter the Fac Comm Cd/Stat and/or Stu Comm Cd/Stat

- The CC code will notify faculty and students of schedule changes.

Step 8 - Save the record.

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Defining Section Requisites

Responsibility: Home

Revised 12/17/03

Sections, like courses, can have requisites which require that a student complete other work before taking the section (prerequisites) or at the same time (corequisites). Sections inherit three types of requisites from the course: prerequisite courses, corequisite courses, and corequisite noncourses. See “Understanding Course Requisites” for definitions of each of these three types of requisites. In addition, sections can have corequisite sections, which are sections which a student should enroll in at the same time as this section.

Use the Section Requisites screen to view prerequisites, including location-specific prerequisites, and view and record co requisites for a course section.

Note: The only modification to this screen from standard Colleague is having the ability to define a co requisite as meaning “must enroll concurrently” or “may have previously taken the course or enroll concurrently.”

Step 1 – Access the Section Requisites (SREQ) screen to define corequisites for a section by detailing from the Requisites field on the Sections (SECT) screen, by detailing from the Section Summary (SSUM) screen or by going there directly from the menu.

Step 2 – Pre-requisites default from and are approved with the course. They cannot be changed at the section level.

Step 3 – Enter/edit the co-requisite course or noncourse

- Co-requisite courses for common courses, that are unique to your university, will need to be assigned at the section level, not at the course level
- As with course corequisites, you can specify whether section corequisites are required or optional by entering **Yes** or **No** in the Required field.
- If the course numbering has changed, the corequisites may need to be re-entered to bring in the new course IDs.
- See “Understanding Course Requisites” for a discussion of how to make corequisites required and how to override requisites at registration.

Step 4 - Can the course only be taken concurrently?

Yes - Enter “Y” in the Concurrent Enrollment Required field.

No: Enter “N” in the Concurrent Enrollment Required field. If you enter “No” here, the student may either have previously taken the course or may enroll concurrently.

For example: On Chem 114L - Section M052

CoReq Course would be Chem 114 with Concurrent Enrollment Set to "N"

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meaning the student can take Chem 114 either before or while they are taking Chem 114L.

On Chem 114 - Section M001

CoReq Course would be blank.

This means you can take the Chem 114 recitation before you take Chem 114L but you cannot take Chem 114L without completing Chem 114 either at the same time or previously.

Using the criteria of checking that the corequisite is taken before or concurrently prohibits you from using the functionality in the CoRequisite Section portion.

Step 5 – Enter/edit the co-requisite section

- Enforced in registration. Used when 2 or more sections in a term must be taken at the same time.
 - An example of corequisite section setup would be for an internet section of a lecture and an internet section of a lab to be linked by corequisite sections.
- For lecture/lab sections with one lecture and multiple labs, enter the lecture section you want linked to the lab as a section co-requisite.

Step 6 – Update the SREQ screen and continue with the Restrictions screen.

Note: As noted above, sections inherit prerequisite courses, corequisite courses, and corequisite noncourses from the course. You can change any of the inherited corequisites, but *not* the inherited prerequisites, on the SREQ screen.

In general, if you change course characteristics after you have created sections from the course, sections already created do *not* change to match the new course characteristics. Prerequisites, however, are the exception to that rule. When you create a section from a course, and later change course prerequisites on the CREQ screen, the section prerequisites automatically change to match the new course prerequisites. Section corequisites, however, do not change.

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Defining Section Financial Information

Responsibility: Home

You can use the Section Financial Info (SFIN) screen to record information about costs to your institution of offering a course. You can access the SFIN screen from the menu, by detailing from the Financial Info field on the SECT screen, or by detailing from the Section Summary (SSUM) screen.

Many of the fields on the SFIN screen are the same as those on the Course Financial Info (CFIN) screen. When you create a section from a course, Colleague defaults the values from the course into the corresponding fields for the section. You can accept those defaults or override them by entering new values for the section. See “Defining Course Financial Information” for the procedure for defining course financial information.

Step 1 – Access the Section Financial (SFIN) screen

Step 2 – Enter/review the Expense codes for lab fees

- Enter LABFE if this section requires a lab fee; an amount does not need to be entered
- Do not enter the projected or actual expense
- LABFE will be referenced in Accounts Receivable rules to generate the appropriate amount as approved by the BOR each year.

Step 3 – Update the SFIN screen

Defining Section Billing Information

Responsibility: Home

Use the Section Billing Information (SECB) screen to define billing information for the section.

Step 1 – Access the Section Billing Information (SECB) screen

- You can access the SECB screen from the menu or from the Billing Info field on the Sections (SECT) screen.

Step 2 – Enter the Billing Method

- Enter T from Tables (most will be this)
- Enter S from Section

Step 3 – Enter the Billing Period Type

- Enter T for Term

Step 4 – Enter/Review the Billing Credits

- Billing credits default from the course and should not be changed here.
- If the section is variable, leave this field blank.

Step 5 – Enter the Schedule Type

- Enter the appropriate schedule type for this section
 - Most will be GSTON – GR State Support On Campus
 - or
 - USTON – UG State Support On Campus
 - Most Med will be MSTON
 - Most Law will be LSTON
 - AIR and MSL will be USTXT
 - WD 101/801 will be USTZ1
 - USSTI – Approved SS05 for any gen ed course offered by a Regental University going to Lake Area, Mitchell or Rapid City Technical Institute
- If you change the schedule type after students are registered, the records will be flagged for rebilling.

Note: The tuition rate for internet classes is as follows:

- If a student registers in only an internet course, it is self support.
- If a student registers in a main campus class and an internet at the same institution, they are both state support.
- If a student registers in a main campus class and an internet at different institutions, it is state support at the main campus and self support for the internet.
- The following paragraph – XN.P.XNEC - can be modified for your university to help in identifying if the student is registered in the incorrect section.

Step 6 – Review the Drop Reg Ref Pol

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- Defaults to policy on the rate table.
- Do not enter anything

Step 7 – Review the Wdrw Reg Ref Pol

- Defaults to policy on the rate table.
- Do not enter anything

Step 8 – Enter Tuition

- If Step 1 was S from Section, enter the appropriate AR Code

Step 9 – Enter Other Charges

- Enter field trip fees, etc here
- Lab fees will be entered on SFIN for some (this will be re-evaluated for S'04)
- Major fees will be assessed by program

Step 10 – Update the SECB screen

Defining Section Restrictions

Responsibility: Home

Section restrictions are registration and scheduling limitations on a section. Use the Section Restrictions (SRES) screen to define restrictions for sections.

Step 1 - Access the SRES screen from the menu, by detailing from the Restrictions field on the Sections (SECT) screen, or by detailing from the Section Summary (SSUM) screen.

Step 2 – Enter/Review the Default Section Capacity, Schedule Capacity & Minimum Enrollment

- The default capacity determines how many students will be allowed in the course.
 - If you leave this field empty, Colleague will allow you to register an unlimited number of students for the section.
- The section capacity determines the absolute maximum of students in the course.
- The section capacity and schedule capacity should be the same number.
- The minimum enrollment determines the minimum number of students that should enroll in this course. This could be used for 7/10 purposes.
 - Enter 7 for courses 500 or above
 - Enter 10 for courses 000 to 499.

Note: if the capacity is increased on a section and there is someone on the waitlist, the waitlist needs to be cleared before students can continue to register in the section.

Step 3 – Enter/Review Reg Restrictions & Other Restrictions

Naming convention for rules is (x)University or (C)ommon -> module -> SR (section restriction) -> name

- Defaults from course
- Enter a rule based restriction for registration if it is specific to this section.
- SEC.OTHER.RESTRICTIONS will not be used in the merged environment.

Examples of Section based restrictions are below.

Section-based restrictions that hold specific course section registration.

Level of Course Section

- Used to determine if the level of the course section is the same as the level of the program(s) as declared by the student by checking SEC.ACAD.LEVEL in registration controls. This check is on a section-by-section basis.
- No restriction is entered.

Level of Student

- Used to determine if the level of the student is appropriate for the selected registration control group or if the student has declared a program at the same level for which enrollments are requested. This data check on STU.CURRENT.ACAD.LEVELS in registration controls will evaluate

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registrations section by section to determine if the student is eligible to register for that section. Any student not meeting the student eligibility check or any section not meeting the section eligibility check will be excluded from processing.

- No restriction is entered.

Academic Level for Graduate, Law and Med School.

- Used to limit the students who register in this section to those that are at certain level such as Graduate, Law or Medical.
- Section Restriction on individual sections

Class Standing

- Place on sections where the enrollment is limited to certain student classifications (FR, SO, JR, SR) and is based on credit hours completed.
- Section Restriction on individual sections

GPA Requirements

- Used to enforce a GPA requirement for a particular course section such as for Honors Courses.
- Section Restriction on individual sections

Program Requirements

- Used to limit registration in a section to those students who have declared the appropriate program.
- Section Restriction on individual sections

Teacher ED Admit Status

- Used to limit registration to those students who have been admitted to teacher education. This check is based on the student program status of 'E'.
- Section Restriction on individual sections

Managing Section Enrollments by Student Enrollment Status

- Used to manage the number of students, current vs. new, that can register for a particular section.
- Section Restriction on individual sections

Step 4 – Enter/Review Equipment, Supplies, Room Characteristics & Room Types

- If this section requires special equipment or supplies, enter them here
 - Values entered in this field are displayed on WebAdvisor under 'Supplies' when a user clicks on a Course hyperlink
 - To direct a student to view the class syllabus to see special equipment or supply requirements, enter SYLLB in the Supplies field
 - This could be used to inform students of special requirements needed for a particular section
- If this section requires special room characteristics or room types, enter them here
 - For example, if the section requires accounting tables, the room characteristic of ACCF or ACCU would be entered
 - For example, if the section requires a smart classroom, the room type of SC would be entered
 - Used in Schedule 25
- These must be defined on the room

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Step 5 – Enter/Review Instructor Consent & Petition Required

- If this section requires written consent to register, enter Yes here
 - Written consent should be entered for all non-term based correspondence courses
 - Written consent should be entered for all non-term based asynchronous internet courses
- Registration requires completion of Student Petition (STPE) screen

Step 6 – Enter/Review Allow Audit, Only Pass/No Pass and Allow Pass/No Pass

- Enter Y if this section is approved to be P/F only in the Only Pass/No Pass field
- ### Normal Grading
- Requires assignment of letter grades (A, B, C, D, and F)
 - Normal grading is permitted only if Field #16 (Only Pass/No Pass) on CRES or SRES is set to “No” or if Field #17 (Allow Pass/No Pass) on CRES or SRES is set to either “Yes” or “No” and the individual student has not selected the pass/fail option at the time of registration.

Pass/Fail Grading

- Requires assignment of S/U grades
- The assignment of an S/U grade is permitted only if Field #16 (Only Pass/No Pass) is set to “Yes” on CRES or SRES or if an individual student requests the pass/fail option at the time of registration (Field #17 must be set to “Yes” either on CRES or SRES to permit this option).

Other Grades

- Other grades such as I, IP, and NP can be given any time the specific criterion of these grades are met. These grades can be given if the course/section is set up for Pass/Fail Grading or for Normal Grading.

Note: During its June 9, 2005 meeting AAC approved the following:

1. x9x series: grading may be A, B, C, D, F, S, U. The decision will be made by the university and entered at the section level when the course is created in Colleague. The university may seek faculty input. When an x9x course or unique course is initially created at the course level (centrally) it will be assumed that A, B, C, D, F grading will be required unless the New Course Request indicates otherwise. Universities requesting a change to S/U grading for a course must submit a Minor Course Modification form. After approval is obtained the grading change is made at the section level by the universities.
2. For all common courses, assume that grading is A, B, C, D, F unless S, U is specified. When a common course is initially created at the course level (centrally) it will be assumed that A, B, C, D, F grading will be required unless the New Course Request indicates otherwise. A university requesting a change in grading for a common course (other than the x9x courses above) must submit a Revised Course Request - Common Courses. Upon receipt of approval, the university will make this change at the section level.

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3. A university may determine to use S, U for all sections of a common course after approval of a Revised Course Request - Common Course Form.

Step 7 – Enter/Review Allow Waitlist, Waitlist Maximum and Waitlist Rating

- To get the automated Waitlist to happen, set Allow Waitlist to Y, enter a max # on the waitlist and set waitlist No. of days to 1. Then on WLAV, set Register to Y.

Step 8 – Update the SRES screen

Note: Many of the fields on the SRES screen are the same as those on the Course Restrictions (CRES) screen. When you create a section from a course, Colleague defaults the values from the course into the corresponding fields for the section. You can accept those defaults or override them by entering new values for the section.

Note: If you define course restrictions *before* you create sections from a course, the restrictions will default to the sections. If you define or change course restrictions *after* you create sections, the restriction information *will not* affect existing sections; it will, however, default to sections created after you implement the changes.

South Dakota Colleague System Procedures

Defining Section Waitlist Criteria

Responsibility: University

Timeframe: Prior to Registration

Complete the following steps to define section waitlist criteria:

Step 1. In the Allow Waitlist field, enter **Y** if you want to allow a waitlist to be created for this section after enrollment passes capacity.

- If you enter N, students are not given the option of enrolling on a waitlist for this section at registration.

Step 2. In the Waitlist Maximum field, enter the maximum number of students allowed on a waitlist for this section. After that number of students is enrolled on the waitlist, students are no longer given the waitlist option at registration.

- If you leave this field blank, there is no limit to the number of students who can waitlist for this section.

Step 3. In the Waitlist Rating field, enter the name of the waitlist rating you want to use for a waitlist of this section.

- If you leave this field blank, the students are listed in the order in which they enrolled on the waitlist.
- The waitlist rating defined for the course defaults to the newly created sections of the course. You can override the course rating and define a rating for a particular section. If you leave the Waitlist Rating field blank, students are listed on the waitlist in the order in which they enrolled on it.
- You can detail to the Course Waitlist Ratings (CWLR) form from the Waitlist Rating field, to further define the waitlist ratings for this section. See “Waitlist Ratings” for more information about defining your waitlist ratings.

Step 4. In the Waitlist Enroll No Days field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

- If you leave this field blank, your institution will not be able to use the waitlist status of Permission to Register. This means that students cannot be offered seats through the Waitlisting Availability (WLAV) process, and that waitlists will be handled manually through the following waitlist management forms:
 - Course Waitlist Management (CWLM)
 - Section Waitlist Management (SWLM)
 - Course Waitlist Alternatives (CWLA)
 - Section Cross-List Waitlist (SXWL)

Step 5. Update the SRES form.

Step 6. If the section is cross-listed sections, continue with Step 7.

Step 7. Access the Section Cross-List (SXRF) form.

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Step 8. In the Waitlist All After First Waitlisted Section field, enter **Y** to waitlist when any section in the cross-list has a waitlist.

- Enter Y if you want to place students on a waitlist as soon as any section in the cross-list has a waitlist. If you do this, you can manage a single waitlist for all cross-listed sections using the Section Cross-List Waitlist (SXWL) form.
- To allow students to continue to register in sections with seats even though one of the cross-listed sections is full, enter N or leave this field blank.
- Waitlisting will be an option only if the section allows waitlisting on the Section Restrictions (SRES) form.

Step 9. In the Global Waitlist Maximum field, enter the maximum number of students allowed on the waitlist. This field limits the number of students who can be put on all the waitlists for all the sections in the cross-list.

Step 10. Update the SXRF form.

Note: If you leave both the Section Capacity and Global Capacity fields blank, then a waitlist is never started as enrollment is unlimited at any level. If you leave the Section Capacity blank for all sections in the cross-list, but enter a number in the Global Capacity, then a waitlist is started for a section when the Global Capacity is exceeded, regardless of what is entered in this field. In this case, where there are no section capacities, but there is a global capacity, the SXWL form can also be used to manage the waitlist.

Setting Registration Date Ranges

Responsibility: Home

Your institution may offer sections that meet at times other than the full term. You define non-standard section registration dates on the Section Reg Date Ranges (SRGD) screen. Registration dates include start and end dates for preregistration, registration, course add, and course drop; as well as the date after which the student cannot drop a course without receiving a grade (specified in the Drop Grades Req'd field on the SRGD screen).

Note: If census day falls in such a way that students have not attended their first class, the end date for add, drop grade required & census dates should be adjusted accordingly for those sections on SRGD. For example, because of where labor day falls in 2004, students will not have attended their first Monday class until after census date. BOR policy gives students until Tuesday, September 14, 2004 to drop those Monday classes even though census day is September 10, 2004.

Registration date ranges can be defined for an academic term, for a specific location, and for a section:

- When you define academic terms using the Academic Records module, you define registration date ranges for the standard term on the Academic Term (ACTM) screen. ACTM has been defined centrally and cannot be changed.
- For each section, you can define section-specific date ranges on the Section Reg Date Ranges (SRGD) screen. The date ranges for the term, defined on the ACTM screen, default to the section. You can override the default dates on the SRGD screen for non-standard semester sections.

Definitions:

Standard Term Sections - Section starts and ends within the beginning and ending week of standard term. SRGD is not completed for standard term sections. Default dates are used for section start/end dates and all add/drop dates.

Non-Standard Term Sections - Section does not start or end within the beginning or ending week of the standard term.

Summer 2005 Standard Term	05-09-05 to 08-26-05
Fall 2005 Standard Term	08-29-05 to 12-20-05
Spring 2006 Standard Term	01-17-06 to 05-12-06
Summer 2006 Standard Term	05-15-06 to 08-25-06
Fall 2006 Standard Term	08-28-06 to 12-15-06
Spring 2007 Standard Term	01-16-07 to 05-11-07

NOTE: SRGD only needs to be completed for non-standard term sections.

Step 1 - Access the SRGD screen from the menu, by detailing from the Sections (SECT) screen, or by detailing from the Section Summary (SSUM) screen.

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Step 2 – Enter override dates for non-standard semester sections.

- Start/End dates of non standard sections must be changed on SECT, SOFF, and FASC and will default to the section start and end dates on SRGD. These dates cannot be changed here.
- Use the SRGD worksheet on the SDBOR website Colleague Procedure page to calculate the non-standard term dates as defined below.

Step 3 – Enter pre-registration/registration dates

- Pre-registration dates must be 1/1/2000 on all non-standard semester sections to prevent the P status from populating on ASTR at the time a student registers.
- Registration dates will be the earliest date the students are allowed to register through the day before the class starts. The start date is determined by the Registrar's module. The end date is the before the section start date.

Step 4 – Enter Add dates

- Start date is the first day of class
- If the start date of the course & 10% of calendar days are the same day, the add end date should be the following day
- End date is 10% of calendar days of the class – do not round up.

Step 5 – Enter Drop dates

- Start date is the first day of class
- End date is 70% of class days
 - For sections without section meeting days and times (TBA), use the SGRD "WORKSHEET" to determine the number of days in which 70% has been met. For TBA sections, 70% is calculated by counting M-F, no weekends, holidays or Spring Break. For example, if the 70% day is calculated as 55 days, count M-F excluding weekends, holidays and Spring Break (if applicable) from the start date of the section to identify the date the 55th day falls. This date will be added to the SRGD screen.
 - For sections with section meeting days and times, use SESC to determine the number of class meeting days by simply counting the meeting dates. Calculate the 70% day by multiplying the class meeting days by .70. This will determine the class meeting day in which 70% has been met. Always round the number up. Example: if SESC has 11 meeting days listed, multiply $11 * .70$ for 7.7. Rounding up this number to 8 days, the 70% date will be the date listed on the 8th line of SESC.

Step 6 – Enter Drop Grades Req'd date

- W grades start the day after census date

Step 7 – Enter Census Dates

- If the start date of the course & 10% of calendar days are the same day, the add end date should be the following day
- 10% of calendar days of the class – do not round up.

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Step 8 – Update the SRGD screen.

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Cross-Listing Sections

Responsibility: Home

Use the Section Cross-List (SXRF) screen to set up cross-listed sections. Cross-listed sections share the same meeting times and instructors.

Note: When sections are collaborative, each campus will set up its own section and the sections will be cross-listed.

Note: When canceling cross listed sections do not cancel the primary section or it will cancel all sections that are cross listed to it.

Step 1 – Access the Section Cross-List (SXRF) screen

Step 2 – Enter the Global Capacity

- Enter the maximum number of students that may be enrolled in the combined sections of the cross-list
- If you leave it blank, Colleague assumes there is no limit
- This does not have to equal the sum of the cross-lists

Step 3 – Enter the Cross-List Sections

- Enter the sections to cross-list
- Section capacity will default in but may be overridden
- One section has to be the primary section

Step 4 – Update the SXRF screen and continue with Additional Info

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Defining Additional Section Information

Responsibility: Home

Revised 10/8/04

From the Additional Info field on the SECT screen, you can detail to either of two screens:

Additional Section Info

Step 1 – Access the Additional Section Info (ASCI) screen

- If you recorded course information on the Additional Course Information (ACOI) screen, Colleague will default that information into the fields on the ASCI screen when you create the section. (See “Defining Additional Course Information”.)

Step 2 – Enter Comments

- Enter 7/10 justifications here
 - Naming convention is SS and number of justification
- Enter section specific comments that won't print

Step 3 – Enter Printed Comments

- Enter printed comments that will appear in the schedule and on WebAdvisor
- Enter printed comments for all correspondence and internet courses
 - Section Numbers with x9..N (where x is the university ID) are reserved for non-term based correspondence courses
 - Add a comment - “Students are not eligible to receive financial aid”.
 - Add a comment that includes contact information for registration.
 - Add a comment indicating instructor consent
 - Sections numbers with x8..N (where x is the university ID) are reserved for non-term based asynchronous internet courses.
 - Add a comment - “Students are not eligible to receive financial aid”.
 - Add a comment that includes contact information for registration.
 - Add a comment indicating instructor consent
- Examples of generic comments: Dept Written Consent; P/F Grading

Step 4 – Update the ASCI screen and continue with the Schedule 25 Section Info screen

Schedule25 Section Info

Step 1 – Access the Schedule 25 Section Info (S2SC) screen

- The Schedule 25 Section Info (S2SC) screen allows you to record section information for use with Schedule 25, a third-party application which some institutions use for batch room scheduling.

Step 2 – Enter Preferred Partitions

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- If this section has a partition preference, enter that here

Note: Partitions are smart coded with the first character being the university identifier.

Step 3 – Enter Equipment Required

- Enter any equipment that is required in the classroom for this section
- The equipment must be defined on the room

Step 4 – Enter Room Characteristics

- Enter any room characteristics that are required in the classroom for this section
- The room characteristics must be defined on the room

Step 5 – Enter Room Types

- Enter any room types that are required for this section
- Example: smart classroom
- The room types must be defined on the room

Step 6 – Enter a Conflict Decider

- Rank this S25 request from 1 (Low) to 9 (High)
- This helps S25 determine priority when scheduling rooms

Step 7 – Update the S2SC screen

Defining Distance Education and Collaborative Sections

Responsibility – Home

Home for DDN is the originating site.

Home for collaborative course sections is the institution that is providing the faculty member.

Timeframe: Prior to enrollment reporting

Delivery Method Codes Guidelines

Effective Fall 2004

Each course section will be assigned a single delivery method code that indicates the primary method by which instruction is delivered to the student. Assignment of the delivery method code will not be changed after the university billing date.

The primary delivery method is the one by which more than half of the instruction is delivered.

Department chairs will be responsible for specifying the code for each section.

In order to facilitate DDN enrollment reporting, any course section that uses DDN as one of its delivery methods must use the appropriate DDN code even if less than half of the instruction is provided via the DDN. For example, an on-campus course that is also sent out to receive sites via the DDN must use the 025 DDN Host/Send Site code.

If a course has one group of students receiving instruction primarily through one type of delivery method and another group of students receiving instruction primarily through another type of delivery method, separate courses sections must be created. For example, one section for students primarily receiving instruction face to face and another section for students primarily receiving instruction over the Internet.

Note: The originating site should code. The primary section should be the state support or originating site section. Reporting will be based off of the Course type of SHO/R, SF, location, the Local ID field, the building/room and cross listing.

Step 1 – Access the Sections (SECT) screen for a course section

Step 2 – Define the delivery method in the Local ID field

- Enter the predominant delivery method on the first line
- Enter the other delivery methods starting on line two
- Existing codes are:
 - 001 Face to Face-
 - Instruction is primarily delivered in a face to face setting with both instructor and student together in the same place at the same time
 - Includes courses that use other delivery methods to support or supplement face to face instruction
 - 002 Correspondence—Non-Term Based Instruction-

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- Instruction is primarily delivered via printed and/or audiocassette, CD-ROM, or videotape material mailed directly to the student
- Involves little or no direct student/instructor interaction
- Offered in various lengths of time that begin or end outside the Standard Term
- 006 Correspondence—Term Based Instruction-
 - Instruction is primarily delivered via printed and/or audiocassette, CD-ROM, or videotape material mailed directly to the student
 - Involves little or no direct student/instructor interaction
 - Offered in a pre-determined period of time (Fall, Spring, Summer) that begins and ends within that period of time.
- 007 Satellite-
 - Instruction is primarily delivered via satellite uplink
 - Instructor-to-student interaction is one-way audio and video, but students can connect to the instructor via phone, fax, email
- 013 Television-
 - Instruction is primarily delivered via television and/or through a local cable connection on a university-designated channel
 - Instructor-to-student interaction is one-way video and audio but students can connect back to instructor via phone, fax or email.
 - Includes recorded instruction on SDPTV Overnight Service
- 015 Internet Asynchronous—Term Based-Web based
 - Instruction is primarily delivered on-line by email, listservs, or internet web sites on a self-paced, non-semester specific format.
 - Offered in a pre-determined period of time (Fall, Spring, Summer) that begins and ends within that period of time.
 - There are no on-campus class meetings.
- 018 Internet Synchronous-Web based
 - Instruction is primarily delivered on-line by email, listservs, or internet web sites on a semester schedule where enrolled students have assignments due at the same time.
 - There are no on-campus class meetings.
- 019 Internet Asynchronous—Non-Term Based -Web based
 - Instruction is primarily delivered on-line by email, listservs, or internet web sites on a self-paced, non-semester specific format.
 - Offered in various lengths of time that begin or end outside the Standard Term.
 - There are no on-campus class meetings.
- 020 DDN Receive Site-
 - Instruction is received via the state's two-way video and two-way audio system (Dakota Digital Network)
- 025 DDN Host/Send Site-
 - Instruction is sent out over the state's two-way video and two-way audio system (Dakota Digital Network)
 - Includes those on-campus sections in which the instructor and some of the students are physically present in the same room

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- 026 Interactive Video-
 - Instruction is delivered by means of synchronous or asynchronous two-way audio/video other than through the state Dakota Digital Network. For example, Internet II.
- 027 Technical Inst, non term based – approved S06
 - Use for general education sections offered face to face by the universities at the technical institute and on the technical institute academic calendar
- 099 Other-
 - A category created to accommodate new and developing technologies for instructional delivery that occur infrequently or are only experimental in nature at this time.
 - Once a new method has been deemed “established” and viable, it can be assigned a different category number

Step 3 – Define the originating/receiving section as a Shared Course or Shared Facility in the course types field

- If it is a shared course at the origination site, enter SHO
- If it is a shared course at the receive site, enter SHR
- If it is a shared facility, enter SF
 - Location, building/room and SF will identify where this section originates from and where this section is received at

Step 4 – Detail on the Cross-Listings field to the Section Cross-List (SXRF) screen

- The current course section displays in the first line of the Cross-List group

Step 5 – Enter the other sections to be cross-listed with this section

- Since there is only one database, the sections can be across databases.
- For example, Fren 301 from NSU and Fren 301 from SDSU can be cross listed on this screen because they are a collaborative course section.
- The origination site should be the primary (PRI) section.

Step 6 – Enter a Global Capacity

- This is the maximum number of students that may be enrolled in the combined sections of the cross-list.

Step 7 – Update the SXRF -> SECT screens

Historical Delivery Method Codes Crosswalk

CODE	STATUS
001 Face to Face/live	Active
002 Correspondence—Non-Term Based Instruction	Active
003 RDTN-Terrestrial	Inactive; crosswalks to 020
004 Internet Video	Inactive; crosswalks to 018

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005 DDN GEC	Inactive; crosswalks to 020
006 Correspondence—Term Based Instruction	Active
007 Satellite	Active
008 Satellite – ADEC	Inactive; crosswalks to 007
009 Satellite – Other	Inactive; crosswalks to 007
011 Audio-conferencing	Inactive; crosswalks to 099
013 Television	Active
014 CD-ROM	Inactive; crosswalks to 002
015 Internet Asynchronous—Term Based	Active
016 SD Public TV (broadcast)	Inactive; crosswalks to 013
017 Videotape Asynchronous	Inactive; crosswalks to 002
018 Internet Synchronous	Active
019 Internet Asynchronous—Non-Term Based	Active
020 Dakota Digital Network	Active
021 Videotape Synchronous	Inactive; crosswalks to 002
022 Other video networks	Inactive; crosswalks to 020
023 TeleWeb	Inactive; crosswalks to 018
024 Mixed Media	Inactive; crosswalks to 099
026 Interactive Vidoe	Active
050 Face to Face Internet Assisted	Inactive; crosswalks to 001
099 Other	Active

Recording Small Section Information

Responsibility: Home

Timeframe: Prior to enrollment reporting

Step 1 – Access the Sections (SECT) screen for the approved small course section

- Small sections are typically approved by the Academic Dean and Vice President

Step 2 – If the course has been approved as a Composite Course, enter ECC in the Course Types field on the lecture

- Remove ECC from sections that do not have a lab required.
- If the course has been approved as a Small Lab, enter ELB on the lecture and lab
- If the course has been approved as a Petition Exemption, enter EPE
- If the course has been approved as a Technical Institute Exemption, enter ETI

Step 3 – Detail on the Additional Info field to access the Additional Section Info (ASCI) screen for an approved small course section justification

- If the section does not have a course type justification, it requires a Comments justification

Step 4 – Enter the appropriate code in the Comments field

- Naming convention is SS -> number
- Enter SS – 099 with an explanation that it is an MTI course for the ETI exemptions

Step 5 – Update the ASCI -> SECT screens

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Copying an Individual Section

Responsibility: Home

Step 1 - Access the Section Copy (SCOP) screen.

Step 2 - At the Course Section LookUp prompt, enter the section you want to copy.

- You can enter the section name, record ID, or synonym

Step 3 - In the New Section field, enter a section number for the section you are creating.

- Remember to smart code the section number with your institutional identifier
- The synonym number is assigned – do not change.

Step 4 – Enter/Edit the Faculty Member

- If you delete the faculty member here and add a new one or just add a new faculty member, you also need to enter the percentage and load
- If a course is team taught, enter all faculty members and change Percent to reflect distribution of workload.
- If a section is cross-listed, divide the Percent between the sections.

Step 5 – Enter/Edit the Section Offering

- Enter the instructional method of the course
- Enter the smart coded bldg and room
- Enter the Start and End Time of the class
- Enter the Days of the week

Step 6 - Finish from the SCOP screen

Step 7 – Access the Section (SECT) screen to change other relevant information such as schedule type, lab fees, etc.

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Copying Sections in Batch

Responsibility: Home

You can copy a group of sections at one time. You may want to replicate all course sections from one academic term into another academic term. For example, you may want to offer a similar catalog of course sections each fall. Use the Section Batch Copy (SBCP) screen to perform the batch copy.

Step 1 – Access the Section Batch Copy (SBCP) screen

Step 2 - In the top part of the SBCP screen, you can define some of the characteristics of the new sections and whether to copy certain characteristics.

- Copy To Term/Start/End
 - Enter what term to copy to
- Default New Status
 - Enter the status for all sections

NOTE: Enter P for Pending if you do not want the sections for a future term to be available for early registration

 - Pending status will not show on WebAdvisor nor will it permit registration.
 - Change Pending to Active with SBSC once you are ready to pre-reg
- Create Dupl Sections
 - Enter Yes if a section should be created if another exists with the same section number and course for the specified term
 - Enter No if it should not be created
- Default From Course
 - Enter Yes to default values from the COURSES record
 - Entering Yes will default the title, credits and instruction method from the COURSE, not the section
 - Enter No to default values from the COURSE.SECTIONS record
- Copy Synonym
 - You must always enter No to allow for system generated synonyms
- Set Meeting Times
 - Enter Yes to copy the meeting start/end dates, meeting times, frequency and instructional method
 - Enter No if you don't want to copy the above information
- Copy Meeting Places
 - Enter Yes to copy building and room
 - Set Meeting Times needs to be set to Yes also
 - Enter No to not copy building and room
- Sched If Conflict
 - Enter Yes to copy sections that are in conflict with each other
 - Enter No not to copy
- Copy Instr Info
 - Enter Yes to copy instructor information

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- Enter No not to copy
- Copy Cross List
 - Enter Yes to copy cross listed sections
 - Enter No not to copy
- Copy Requisites
 - Enter C to copy requisites from the Course
 - Enter S to copy requisites from the Section
 - Enter N to not copy requisites
- Copy Restrictions
 - Enter C to copy restrictions from the Course
 - Enter S to copy restrictions from the Section
 - Enter N to not copy restrictions
- Copy Fin/Billing
 - Enter C to copy billing/financial info from the Course
 - Enter S to copy billing/financial info from the Section
 - Enter N to not copy billing/financial info
- Copy User Fields
 - Enter Yes to copy user fields
 - Enter No not to copy user fields

Step 3 - In the bottom part of the SBCP screen, limit the sections to be copied by specifying a saved list and/or other limiting criteria.

- Saved List Name
 - Enter a Saved List Name from the COURSE.SECTIONS file
 - Be sure you only copy sections from your university – select by Location.
- Copy From Term, Start Date, End Date
 - Enter the term you are copying from
- Other selection criteria includes:
 - Section Statuses
 - Subjects
 - Courses
 - Departments
 - Divisions
 - Schools
 - Additional Selection Criteria – if you do not use a saved list be sure to include Location as additional selection criteria.

Step 4 – Update the SBCP screen

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Changing Statuses of a Section

Responsibility: Home

Timeframe: Cancel 0 enrollment sections prior to enrollment reporting; change sections from pending to active for WebReg; ongoing

Use the Section Batch Status Change (SBSC) screen to change the status for an individual section or a group of sections.

Step 1 – Access the Section Batch Status Change (SBSC) screen

Step 2 – Enter the New Status

- Example: Active, Canceled, Pending

Note: Pending sections do not show up in the WA search so code sections as pending until your university is ready to allow registrations.

Step 3 – Enter Y/N for Rebill Immediately

- If billing has been moved to AR, enter Yes
- If billing has not been moved, enter No

Step 4 – Enter a Saved List Name, if desired

- This can be used to batch cancel zero enrolled sections after census date for a semester. Only change status for sections with your location.

Step 5 – Enter Faculty/Student Comm Codes

- Enter Comm Codes here to notify faculty of changes
- Enter Comm Codes here to notify students of changes

Step 6 – Include Individual Sections to change

- If you use a saved list, the whole list will appear here
 - The saved list can be edited from here
- If you don't use a saved list, enter individual sections here.

Note: If you cancel the primary section of cross-listed sections, all secondary sections will be cancelled. If you want to cancel the primary section but not the secondary sections, identify another section as the primary section and the targeted section as a secondary section. For more information about cross-listing sections, see “Cross-Listing Sections”.

Note: When you change a section to canceled and there are registrations, it will de-register the students and re-bill them if Step 3 is set to Yes. If you cancel a section after census date, you need to go to STAC for all students to change the status date there to the census date of the semester.

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Note: Canceling a section does not always clear out the calendar.schedules file. This will typically show up as a conflict when a student tries to register. If this happens, try running an individual rebuild on the specific section in question.

Step 7 – Update the SBSC screen

Step 8 – Route the report to applicable FA or AR offices

Use the Section (SECT) screen to change the status for an individual section

Step 1 – Access the Sections (SECT) screen

Step 2 – Enter the course section to be canceled

- If students are registered for this section, a WARNING: There are students registered for this section: error appears.
- If students are registered, cancel this section using SBSC.

Step 3 – Enter a (C)anceled status in the status field

Rebuild Section Meeting Dates

Responsibility: Home

Use the Rebuild Section Meeting Dates (RSMD) screen to rebuild the actual CALENDAR.SCHEDULES meeting information of selected sections from their meeting times printed on the schedule.

Note: This should be run prior to running S25 to insure all calendars are built for all sections.

Note: Use caution when running this during a current semester. If the section has ended for that term (i.e. a nonstandard section within the full semester), RSMD will not rebuild the meeting dates. Also, if the dates on the Section Schedule Detail (SESC) have been modified, RSMD will overwrite them.

Step 1 – Access the Rebuild Section Meeting Dates (RSMD) screen

Step 2 – Define the sections to rebuild using the following fields

Enter a Saved List Name

- **Be sure to run only for your location.**
- With IDs selected from the COURSE.SECTIONS file
- SELECT COURSE.SECTIONS WITH SEC.TERM EQ '2003FA'
- SELECT COURSE.SECTIONS WITH SEC.CURRENT.STATUS EQ 'A'
OR WITH SEC.CURRENT.STATUS EQ 'P'
- SELECT COURSE.SECTIONS WITH SEC.START.TIME NE ''
- SELECT COURSE.SECTIONS WITH SEC.LOCATION EQ 'xxx' (where xxx is your university)
- SAVE.LIST Xx.LMF.RSMD.mmdd (where x is your university identifier, LMF are your initials and mmdd is the month and day)

Terms

- Enter the current term

Locations

- Enter your university identifier

Step 4 – Update the RSMD screen

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Generating Section Availability Reports

Responsibility: Home

Use the Section Availability Report (CSAR) screen to generate a report indicating whether course sections are available.

This report gives you section availability information including the following:

- **Room Cap**—room capacity
- **Sect Min**—section minimum enrollment
- **Sect Cap**—section capacity
- **Used**—number of used (filled) slots
- **Wait**—number of waitlisted students
- **Avail**—number of slots still available

This report will not show sections with Pending Status.

Step 1 – Access the Section Availability Report (CSAR) screen

Step 2 – Enter the information to determine parameters for printing

- Print Open Sections – Enter Y to print open sections
- Print Closed Sections – Enter Y to print closed sections
- Print Primary Only – Enter Y to print primary and non-crosslisted sections
- Print by Loc or Fac – Define if you want to print by location or faculty
- Print Global or Local – Define if you want to print global schedule capacities or local capacities
- Include Printed Comments – Enter Y to print comments for the sections
- Name/Address Hierarchy – Enter the hierarchy used to print out the report

Step 3 – Enter selection criteria to be used when pulling sections

- In the Saved List Name field, you can specify a saved list of records from the COURSE.SECTIONS file (be sure you only select students for your university) or enter:
- Sec Dates Begin/End – Enter Section begin and end dates
- Terms – should always be entered
- Subjects
- Courses
- Course Sections
- Synonyms
- Departments
- Divisions
- Schools
- Locations – should always be entered so you will receive a list only for your university.
- Faculty Members

Enter specifics to further define the sections you want listed in the report
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Step 3 – Enter any Additional Selection Criteria, if applicable

Step 4 – Enter a networked printer or Hold with a banner name

Step 5 – Update the CSAR screen

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Generating Section Rosters

Responsibility: Home

You can use the Section Roster (SROS) screen or Section Prerequisite Roster (SPRT) screen to view or print a section roster. The SROS/SPRT screens have the same fields.

The difference between these two screens is the information included in the report. The report generated from the SROS screen includes four pieces of information, for each student, which are not included in the report generated from the SPRT screen:

- Acad Level Taken
- Acad Program
- Admit Status
- Anticipated Completion Date

The report generated from the SPRT screen includes, for each student, an indication of the student's progress with respect to course prerequisites. This information is not included in the report generated from the SROS screen.

Step 1 – Access the Section Prerequisite Roster (SPRT) or Section Roster (SROS) screen

Step 2 – Enter the information to determine parameters for printing

- ID (SSN should **never** be included on a roster)
- Double-space
- Separate Cross-List
- Print Cross-List Ref
- Print Special Needs
- Print Dropped/Withdrawn
- Print Waitlisted
- Print Phone Types

Step 3 – Enter selection criteria to be used when pulling/printing sections

- From either the SROS or SPRT screen, you can specify a saved list of records from the COURSE.SECTIONS file to limit the sections included in the roster.
 - Section Date
 - Terms
 - Faculty Members
 - Subjects
 - Courses
 - Sections
 - Locations – enter only your university

Step 4 – Enter any Additional Selection Criteria, if applicable

- For example, to get rosters for DDN sections, type WITH SEC.LOCAL.GOV.CODES EQ '005' for DDN GEC rosters

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Step 5 – Enter the networked printer or Hold and a banner name

Step 6 – Update the SPRT or SROS screen

South Dakota Colleague System Procedures

Generating Section Schedules

Responsibility: Home

After you have scheduled your course sections, you may want to generate a report listing these schedules.

Step 1 – Access the Course Section Schedule (CSSC) screen.

Step 2 - In the top part of the screen, you can define the format and content of the schedule.

- Sort Selection
 - Use this field to define how you want Colleague to sort the schedule.
 - **Enter... To Sort By...**

HS	Hierarchy and Section
	○ “Hierarchy” sorts by school, division, and department
DS	Department and Synonym
SE	Section
SS	Subject and Synonym
D	Day and Time
- Block Type
 - If you select the Day and Time sort in the Sort Selection field, you must also decide if you want a Block Type of (F)ull or (C)ondensed. The “full” option prints more information about each section than the “condensed” option.
- Print Requisites
- Include Printed Comments

Step 3 - In the middle and lower parts of the screen, you can specify a saved list and other criteria to limit the sections included in the schedule.

- **Run only for your university.**
- Saved List Name—The saved list must select records from the COURSE.SECTIONS file.
- Section Dates
- Meeting Times
- Meeting Day
- Subjects
- Courses
- Course Sections
- Terms
- Departments
- Divisions.
- Faculty Members
- Locations.
- Instructional Methods
- Addnl Selection Criteria

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Step 4 – Enter a networked printer or Hold with a banner name

Step 5 – Update the CSSC screen

South Dakota Colleague System Procedures

Defining Section Waitlist Criteria

Responsibility: University

Note: On all Registration Controls (RGCT), Allow enrollment in Waitlisted Courses is set to “NO” for Prereg, Reg, Add/Drop and Other. This means that students cannot enroll if a waitlist has begun for a section.

Complete the following steps to define section waitlist criteria:

Step 1 - Familiarize yourself with section waitlist criteria.

- See “Understanding Section Waitlist Criteria” at www.datatel.com.

Step 2 - Access the Section Restrictions (SRES) screen.

- You can access the SRES screen by detailing from the Restrictions field on the Sections (SECT) screen or directly from the menu.

Step 3 - In the Allow Waitlist field, enter Y if you want to allow a waitlist to be created for this section after enrollment passes capacity.

- If you enter N, students are not given the option of enrolling on a waitlist for this section at registration.

Step 4 - In the Waitlist Maximum field, enter the maximum number of students you want to be on a waitlist for this section.

- If you leave this field blank, there is no limit to the number of students who can waitlist for this section.

Step 5 - In the Waitlist Rating field, enter the name of the waitlist rating you want to use for a waitlist of this section.

- If you leave this field blank, the students are listed in the order in which they enrolled on the waitlist.

Step 6 - Update the SRES screen.

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SCHEDULE 25

South Dakota Colleague System Procedures

Setting Course Requirements in S25

Responsibility: Home

Step 1 - Access the S25 Course Info (S2CO) form.

Note: Common courses should be set up at the section level, not the course level.

Step 2 - At the Course LookUp prompt, select the course for which you want to set S25 information.

- Enter the Course ID if you know it, or perform a Course LookUp to locate the desired course in the database.

Step 3 - In the Preferred Partitions field,

- Enter the partitions where sections of this course are to be scheduled.
- Enter the Partition ID if you know it, or perform a Standard LookUp to locate the desired partitions.

Note: Partitions are smart coded with the university identifier as the first character.

Step 4 - In the Equipment Required field,

- Enter the Equipment needed to teach all sections of this course.
- Enter the Equipment code if you know it, or perform a Standard LookUp to locate the desired equipment.
 - The equipment must be entered as part of the room also.
 - Do not enter “portable” equipment that is often moved from one room to another.
 - Do not enter on common courses unless you know that every university also required this equipment.

Step 5 - In the Room Characteristics field,

- Enter any special room characteristics that are required by all sections of this course.
- Enter the Room Characteristics code if you know it, or access the valcode table to select the desired room characteristics.
 - The room characteristics must be entered as part of the room also.
 - Do not enter on common courses unless you know that every university also required this room characteristic.

Step 6 - In the Room Types field,

- Enter the type of room required for all sections of this course.
- Enter the Room Type code if you know it, or perform a standard LookUp to locate the desired room types.
 - The room type must be entered as part of the room also.
 - Do not enter on common courses unless you know that every university also required this room type.

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Step 7 - In the Conflict Decider field,

- Enter the relative priority that this course should receive over other courses.
- Enter a number from 1-9, with 1 being the lowest priority and 9 being the highest priority.

Step 8 - Save your work and exit the form.

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Setting Course Section Requirements in S25

Responsibility: Home

Step 1 - Access the S25 Section Info (S2SC) form.

Step 2 - At the Course Section LookUp prompt, select the course section for which you want to set S25 information.

- Enter the Course Section ID if you know it, or perform a Course Section LookUp to locate the desired section in the database.

Step 3 - In the Preferred Partitions field,

- Enter the partitions where this course section is to be scheduled.
- Enter the Partition ID if you know it, or perform a Standard LookUp to locate the desired partitions.

Note: Partitions are smart coded with the university identifier as the first character.

Step 4 - In the Equipment Required field,

- Enter the Equipment that is required to teach this course section.
- Enter the Equipment code if you know it, or perform a Standard LookUp to locate the desired equipment.
 - The equipment must be entered as part of the room also.
 - Do not enter “portable” equipment that is often moved from one room to another.

Step 5 - In the Room Characteristics field,

- Enter any special room characteristics that are required by this course section.
- Enter the Room Characteristics code if you know it, or access the valcode table to select the desired room characteristics.
 - The room characteristics must be entered as part of the room also.

Step 6 - In the Room Types field,

- Enter the type of room required for this course section.
- Enter the Room Type code if you know it, or perform a standard LookUp to locate the desired room types.
 - The room type must be entered as part of the room also.

Step 7 - In the Conflict Decider field,

- Enter the relative priority that this course section should receive over other course sections.
- Enter a number from 1-9, with 1 being the lowest priority and 9 being the highest priority.

Step 8 - Save your work and exit the form.

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Assigning Course Sections to the Same Room in S25

Responsibility: Home

Step 1 - Access the Course Sections in Same Room (S2SR) form.

Step 2 - Do you want to create a *new* Room Schedule Group, or *modify* an existing group?

- **New.**
 - Enter **A** at the Room Schedule Group LookUp prompt.
- **Existing.**
 - Perform a Standard LookUp to locate the desired group.

Step 3 - In the Course Sections field, enter the “key” course section that S25 will use to make the room assignment.

- Enter the Course Section ID if you know it, or perform a Course Section LookUp to locate the desired section in the database.

Step 4 - Remain in the Course Sections field,

- Enter the rest of the course sections that you want S25 to assign into the same room.

Step 5 - Optionally enter any comments about this group.

- If the comments are lengthy, you can detail to the Edit Comments (UTED) form to view or edit a larger block of text.

Step 6 - Save your work and exit the form.

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Entering Faculty Information in S25

Responsibility: Home

Step 1 - Access the S25 Faculty Info (S2FI) form.

Step 2 - At the Faculty LookUp prompt, select the faculty member for whom you want to specify S25 information.

- Enter the faculty member's Person ID if you know it, or perform a Person LookUp to locate the desired faculty member.

Step 3 - In the Preferred Partitions field,

- Enter the partitions where this faculty member would prefer to schedule course sections.
- Enter the Partition ID if you know it, or perform a Standard LookUp to locate the partition in the database.
 - Type the university identifier and ... to view a listing of your partitions

Step 4 - In the Conflict Decider field,

- Enter the relative priority that this faculty member should receive over other faculty members.
- Enter a number from 1-9, with 1 being the lowest priority and 9 being the highest priority.

Step 5 - Save your work and exit the form.

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Creating or Modifying Partitions

Responsibility: Home

Timeframe: With building/room changes in Facilities

Step 1 - Access the S25 Partitions (S2PR) form

Step 2 - Do you want to create a *new* partition, or modify an *existing* partition?

- **New.**
 - At the Partition LookUp prompt, enter a new, unique partition name.
 - Naming convention is university -> name
 - Colleague prompts you to confirm that you want to create a new partition.
 - Partition names may be up to seven characters long.
- **Existing.**
 - At the Partition LookUp prompt, enter the name of the desired partition or perform a Partition LookUp to locate the partition in the database.
 - The partitions are smart coded so using the university identifier and ... will locate only your specific university partitions.
 - Colleague displays information about the selected partition.

Step 3 - In the Description field,

- Enter or edit the text description of this partition.

Step 4 - Perform a Building LookUp to select the building that contains the desired room.

- Colleague displays the building code and description.
- Buildings are smart coded by university.

Step 5 - Perform a Room LookUp to select the specific room that you want to add to the partition.

- You can select only from the rooms that are in the specific building.
- Colleague displays the room code and description.

Step 6 - Repeat steps 4-5 as needed to assign other rooms to this partition.

- Remember that a partition may have many rooms assigned to it, but any given room can be assigned to only one partition.
- **Tip:** If you are assigning rooms from the same building entered on the previous line, enter @ at the Building LookUp prompt to repeat the previous entry.

Step 7 - Optionally enter comments about this partition.

- You can detail to the Edit Comments (UTED) form to more easily add, view, or edit longer comments.

Step 8 - Save your work and exit the S2PR form.

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Setting Up Department Information

Responsibility: Home

Step 1 - Access the SCHEDULE25 Department Info (S2DI) form.

- You can access the S2DI form from the menu system.

Step 2 - Select the department that you want to set up.

- Enter the Department ID or perform a Department LookUp to select the desired department.
- Departments are smart coded by university. Type the university identifier and ... to view a list of departments for your university.

Step 3 - Assign partitions to the department.

- All departments that you intend to export to S25 must have at least one partition assigned to them.
- Select the desired partition by entering the Partition ID if you know it, or performing a Partition LookUp.
- For each partition that you enter, you must also specify a priority Group.
 - The Group can be any number from 1 to 4, with the lower number indicating that S25 should give a higher priority to rooms from that partition when assigning this department's course sections.

Step 4 - Optionally enter any equipment that is required for all rooms to be assigned to course sections from this department.

- Enter the Equipment code if you know it, or perform a Standard LookUp to locate the desired equipment.
- The equipment must also be entered on the room.

Note: The Equipment, Room Characteristics, and Room Types fields discussed in Steps 4-6 are optional. You might find it more beneficial to enter and maintain room requirements at the course or course section levels.

Step 5 - Optionally enter any room characteristics that are required for all rooms to be assigned to course sections from this department.

- Enter the room characteristic codes if you know them, or select the desired characteristics from the valcode table.
- The room characteristics must also be entered on the room.

Step 6 - Optionally enter any room types that are allowed to host course sections from this department.

- Enter the room type codes if you know them, or perform a Standard LookUp to locate the desired codes.
- The room types must also be entered on the room.

Step 7 - In the Conflict Decider field,

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- Enter a number between 1 and 9 (with 9 being the highest priority).
- This value helps S25 decide conflicts in cases where two departments are requesting the same room. The higher the number, the higher the priority that this department has over other departments.

Step 8 – Continue with Steps 2-7 to assign partitions to all departments that you will be exporting.

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Setting Up the Campus Profile

Responsibility: Home

Note: The following profiles must always be run in the order shown below. If any changes are made to Colleague or the S25 maintenance screens, all the profiles must be re-run.

Step 1 - Access the Room Characteristics Profile (S2RC) form.

Step 2 - Complete the S2RC form.

- Define the following fields
 - Saved List Name
 - This saved list must contain records from the EQUIPMENT file.
 - Room Characteristics
 - Room Types
 - Equipment Available
 - Additional Equipment Selection Criteria

Step 3 - Access the Partitions Profile (S2PP) form.

Step 4 - Complete the S2PP form.

- Define the following fields
 - Saved List Name
 - This saved list must contain records from the PARTITIONS file.
 - Partitions
 - Additional Selection Criteria

Step 5 - Access the Departments Profile (S2DP) form.

Step 6 - Complete the S2DP form.

- Define the following fields:
 - Saved List Name
 - This saved list must contain records from the DEPTS file.Departments
 - Academic Levels
 - Divisions
 - Schools
 - Institutions
 - Department Types
 - Preferred Partitions
 - Room Characteristics
 - Room Types
 - Locations – Enter your university only.

Step 7 - Access the Rooms Profile (S2RP) form.

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Step 8 - Complete the S2RP form.

- Define the following fields:
 - Saved List Name – Run for your university only.
 - This saved list must contain records from the ROOMS file.Buildings
 - Room Types
 - Primary Uses
 - Equipment Available
 - Room Characteristics
 - Responsible Depts
 - Coordinating Depts
 - Partitions
 - Wings
 - Floors
 - Additional Selection Criteria

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Exporting Course Sections to S25

Responsibility: Home

Note: Run this process for your university only. This process will need to be coordinated amongst the universities because it creates only one Schedule 25 Directory.

Step 1 - Access the S25 Export (S2EX) form.

Step 2 - In the Export Flag field,

- Indicate whether or not you want S25 to preserve room assignments that it has already made for course sections that were included in previous exports.
 - Enter **Y** if you want S25 to preserve previous room assignments.
 - Enter **N** if you want S25 to re-evaluate and re-assign all of the course sections in the current export batch.

Step 3 - In the Min for contiguous courses option field,

- Enter the time interval in minutes that defines a contiguous course.
 - If two course sections have the same instructor, and begin within this many minutes of each other, they are considered contiguous sections and will be assigned to the same room.
 - Leave the field blank, or null it out, if you do not want to use the contiguous course feature.

Step 4 - In the Conflict Deciders field,

- Indicate the order in which you want S25 to evaluate conflict decider values.
 - For each type of conflict decider, enter **0** if you do not want S25 to use a particular conflict decider.
 - Otherwise, enter **1** for the conflict decider that you want S25 to look at first, enter **2** for the conflict decider that you want S25 to look at second, etc.

Step 5 - In the Scheduling Start/End Date field,

- Enter the date range for which the room assignments are to be made.
 - The room assignments S25 makes for all course sections in this export batch will be in effect during the date range that you enter here.
 - This will typically coincide with the semester dates.
 - The rooms are available for other uses before and after the dates you enter.

Step 6 - In the rest of the fields on this screen,

- Enter criteria to select the course sections that you want to include in this export batch such as:
 - Saved List Name
 - The saved list must contain records from the COURSE.SECTIONS file. Run for your university only.

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- Course Sections
- Section Statuses
- Start/End Dates
- Terms
 - Enter a Term
- Locations Incl/Excl
 - Enter a location
- Subjects Incl/Excl
- Departments Incl/Excl
- Faculty
- Schedule Type
- Addnl Sel Criteria

Step 7 - Save your work and exit the S2EX form.

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Importing S25 Room Assignments

Responsibility: Home

Note: Run this process for your university only. This process will need to be coordinated amongst the universities because it creates only one Schedule 25 Directory.

Step 1 - Access the S25 Import (S2IM) form.

Step 2 - In the Import File Name field,

- Enter the name of the file you want to import.
- The file must exist in SCHED25.DIRECTORY in order for the import process to find it.

Step 3 - In the Estimated Number of Records field,

- Optionally enter the approximate number of records contained in the import file.

Step 4 - In the Rebuild Meeting Dates field,

- Enter Y to have Colleague run the rebuild meeting dates process upon completion of the import.

Step 5 - Enter Y in the OK to Proceed field.

Step 6 - Save your work and exit the form.

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APPENDIX

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Course ID versus Course Name in Releases 14+

This document attempts to explain the difference between course IDs and course names, how each is used by the system, and why it is important for a system administrator to understand the difference between names and IDs. Anyone involved with the creation and/or maintenance of the COURSES file should read this.

Course ID vs. Course Name

Course definitions are stored in the COURSES file. The IDs of the records in this file are simply system tags used to identify the records. These IDs are invisible to the end-user and are without meaning. For example, the course named MATH*100 might have the ID 28391. The user sees the name but not the ID. This was not always so. Prior to release 14, the course's name WAS its ID.

There are great advantages to using a meaningless number as a course ID rather than using the course name. However, since this ID is not visible to the end-user, those who do not understand the system could unintentionally do the wrong thing. Hopefully this document will clearly demonstrate not only the beauty of the system, but also the dangers.

What's important to the users is the course's name. The course name is stored in the COURSES record, just like any other data field. The name of this field is CRS.NAME. The name field is built by the system out of a combination of the course's subject (CRS.SUBJECT) and its course number (CRS.NUMBER). For example, a particular record in the COURSES file might have:

- ID = 329
- CRS.SUBJECT = MATH
- CRS.NO = 288
- CRS.NAME = MATH*288
- CRS.TITLE = Introduction to Calculus

This relationship can be seen clearly by performing the following Unidata query:

```
: LIST COURSES BY CRS.NAME CRS.SUBJECT CRS.NO CRS.TITLE
```

The system builds the course name by concatenating the subject with the number, separating them with whatever character your institution has decided to use as the course name delimiter (this document uses "*"). This delimiting character is entered on the CDEF (Course Defaults) parameter screen.

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You should be aware that the system builds the course name only through CRSE, and only when the course is initially created, or when the subject or course number is changed. If you subsequently go into CDEF and change the course delimiter from "*" to "-", the change does not affect the name of any existing course.

There are many advantages to using a numeric ID that has no inherent meaning. The primary advantages are that it allows more than one course to have the same name, and that it allows a course to change its name over time yet still remain the same course (i.e., same content). If you have two different campuses, each of which has its own course naming scheme, this allows you to create two courses called CHEM*100, each of which has its own course title, description, credits, prerequisites, grading scheme, department, location, etc.

We can now take a look at what gets stored into the student's academic record, and how that affects Degree Audit and course prerequisite checking. The student's academic record is stored in the STUDENT.ACAD.CRED file. Every course the student has ever taken, registered for, or received as equivalency credit, is represented in that file, one record per course. In this record we store, among other things, the following two items:

- STC.COURSE.NAME
- STC.COURSE

The first item is the name of the course **at the time that the student took it.**

The second item is the course's ID.

It should be clear at this point that it's not enough to store just the course's name (STC.COURSE.NAME), since that same name can be used over time by different courses. To know the student took MATH*288 tells us nothing in a world where MATH*288 can change meaning over time. We therefore store the course's ID as well. **It's the ID that tells us the content of the course, not the name. It's the ID that we look at when checking degree audit requirements and prerequisites.** As long as the course "INTRODUCTION TO CALCULUS" keeps the same ID over time, then its name can change freely. Whenever we see the ID "329" in a student's record, we'll know he took calculus.

The course name is stored into STC.COURSE.NAME only for display purposes. STC.COURSE.NAME is not used in any processing. It is not used to check for repeats, course prerequisite, or Degree Audits. It's used purely for display purposes, such as on transcripts, so a student's transcript will always display the name of the course at the time the student took it.

What happens when you type in an academic requirement? For example, what happens when you enter a prerequisite of "TAKE MATH*288" on the CREQ (course requisites) screen? When you file the screen, we store the **intent** of your words in a set of tables. In these tables, we store the course's ID, not the name. Essentially, we store the intent "Take course 329" (although we don't really store the words "take course"). The same

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thing happens in Degree Audit requirements. Just as in course prerequisites, we never store your original wording of the requirements; we store only the intent, using internal tables that hold the course ID. The next time you pull up that same requirement, you may see a slightly different wording (but the same intent). This is because the system never stored your original wording, and has to rebuild the text from its own internal tables. You may have typed in "TAKE COURSE MATH*288", but the system stored "TAKE 329", and, when you pull it back up the system does the reverse translation and builds the text "TAKE MATH*288", causing you to see a slightly different wording (you lost the word "COURSE").

Clearly then, this presents a problem if someone deletes COURSES record number 329. When you pull up any academic requirement (course prerequisite or Degree Audit requirement) that still contains ID 329 in its internal tables, the system will be unable to do the reverse translation. It will see course 329 and be unable to translate it into MATH*288 because the COURSES record, which it needs to read in order to find out the current name, is no longer available. This is just one of the reasons you should never delete a course record.

When the system tries to evaluate an academic requirement, it does so by looking for the course's ID in the student's records. It does not look for a name. A course prerequisite may have originally been entered by you as "TAKE MATH*288", but it was stored by the system as course ID 329. When it comes time for the system to determine if the student has met the requirement, the system goes looking through the student's record for a course with ID 329, with no regard to what that course was called at the time the student took it. During the evaluation, the system doesn't in any way care what the name of the course is or was. It uses the course name only for display purposes.

Changing Course Numbers/Names

Let's suppose that your institution has decided to change the numbers and/or names of some or all courses. What is the correct way to implement this change? For example, how should you change "Introduction to Calculus" from MATH*288 to MATH*200?

Simply pull course MATH*288 up in CRSE, and change the data field called "Course Number" to 200. When you file the record, the system changes the course's name to MATH*200, but the ID of the record remains 329. Now if you register a student for MATH*200 and grade him, the system will store the ID "329" in his records, which will match the ID stored in the old academic requirements, causing them to evaluate correctly.

If you consider this system carefully, **the course ID can be thought of as a representation of a course's content**. When you change the number of a course, you just pull up that course and change its number, the content doesn't change, and therefore all student records and academic requirements that reference that content (that ID), are still correct.

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Consider also the fact that under this procedure, all academic requirements which had been entered as "Take MATH*288" will now magically appear (correctly) as "Take MATH*200" if you were to pull them up onscreen following the change. None of the requirements need to be changed because they all referenced the course by ID (by content) instead of by name. When you pull them up onscreen, the reverse translation from tables to text will correctly translate ID 329 to its CURRENT name.

If you are ever interested in the name of the course as it was known at the time the student took it, this information is stored in the STUDENT.ACAD.CRED record, in the field STC.COURSE.NAME. It's this field which prints out on transcripts and DA evaluations.

Now let's discuss **how NOT to do it and why:**

One approach you might have taken would be to pull up MATH*288 in CRSE and hit the RECORD.DELETE key to delete it, then use CRSE to create a new course called MATH*200, giving it the title "Introduction to Calculus". This approach may appear to be correct at first glance. You now indeed do have a course with the name MATH*200 and the title "Introduction to Calculus".

However, this new course will not have the same ID as the old one. For example, this new course's ID may be 881. If you subsequently register and grade someone for this course, he'll have on his record that he took course 881. However, any old academic requirement (one specified before you made the change) will still have ID 329 in its tables, and will be looking for course 329 in the student's record in order to be satisfied. **New registrations of calculus won't be applicable toward old calculus requirements.**

Also, if you now pull up an old requirement (either a prerequisite in CREQ or a DA requirement in SRSP), the system will fail when it tries to do the reverse translation of course ID back into course name--it will not find course 329 on the COURSES file. **You will receive an error message when attempting to view an old calculus requirement.**

Another problem is that if you create a new academic requirement after these changes, that new requirement, specified as "Take MATH*200" will be stored using the new ID of 881. Any student who took calculus back when it was math*288 won't satisfy that requirement because the system will be looking for course 881, when their records indicate that they took course 329. **Old calculus courses won't be applicable to newly created calculus requirements.**

This leads to a reiteration of our previous warning:

NEVER DELETE A COURSE RECORD!

Another approach you might have taken would be to inactivate the MATH*288 correctly, then create a new course called MATH*200 and equate the two courses. This method does allow requirements that reference course 329 (MATH*288) to also reference course

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881 (MATH*200). However, the requirement, whose internal reference is course 329, will continue to display MATH*288 as the course that is needed on Degree Audit evaluations, as demonstrated below:

MATH*288 _____ 1 course needed

That course is no longer available to students since you deactivated it. When the course name is properly changed on the course 329 record, the internal translate tables will immediately reference the new course name, as shown below:

MATH*200 _____ 1 course needed

None of the requirements need to be changed because they all referenced the course by ID (by content) instead of by name.

Proper Way to Deactivate A Course.

If you decide to no longer offer a course, then simply bring the course up in CRSE and change its status to inactive. **Do not delete the course**, since there still may be some academic requirements that reference it, and since there will certainly still be students who reference the course in their academic record.

Proper Way to Change Course Content

Occasionally you may have a situation where a course changes so significantly from one term to another that you no longer want the students to be able to use the old and new versions interchangeably to meet prerequisites. For example, suppose the course "Introduction to Computers" is course CMSC*200 (and its ID is 555), and that you decide to significantly revamp the course, to the extent that you want to be able to write some new requirements which specifically require this new version of the course.

Logically, whether you fully realize it or not, you now have two different courses to deal with (DIFFERENT CONTENT = DIFFERENT COURSE). Since you have a new course, you need to create it. First pull up the old course in CRSE and change its status to inactive (assuming that you aren't going to offer the old course any longer – skip this step if that assumption isn't valid.) Then create the new course in CRSE.

The only real question is what name to give this new course. There are several approaches.

One approach is to give the new course the same name as the old one (CMSC*200). Use CRSE to create (add) a new record, which also has the subject "CMSC" and the number "200". When you file this new record, the system will assign it the name CMSC*200 and some ID (e.g., 997).

Another approach is to create this new course under a new previously unused name such as CMSC*200B (or CMSC*201). The steps are the same as the first approach, only you enter "200B" as the "number".

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The benefit to the first approach is that it does exactly what you want. However, it has a drawback. Since there are now two courses named CMSC*200, each time you specify the course, the system will recognize that there are two courses out there with that name, and it will ask you to pick the one you mean. The benefit to the second approach is that it makes referring to the different versions of the course trivial – they each have a different name. This makes it trivial to specify requirements differently. Some requirements (the older ones) state "take CMSC*200", and others (the newer ones) state "take CMSC*200B".

Note that there is actually a third approach. This approach, like the second one, gives each version its own name. The difference is that this time it's the new version that gets to have the name CMSC*200. The old version's name gets changed to something like CMSC*200-OLD, or better yet, CMSC*200-1995 (the pre-1995 version). To do this...

1. pull up the old course in CRSE, change its status to inactive (if desired,) and change its "number" to 200-1995.
2. Create the new course in CRSE, giving it the name CMSC*200. The third approach is probably the best one because it lets you keep your traditional name for the course while still letting you easily distinguish between the old and new version.

Since the new course is more strenuous, you may want to revisit some of the older (but still being followed) catalogs and give students a choice. For example, under the third approach, change the requirement from "take CMSC*200-1995" to "Take CMSC*200-1995 or CMSC*200".

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Where Do Equate Codes Fit In?

Equate codes are entered on the CRSE screen to tell the system that two or more different COURSES records can be used interchangeably to meet requirements which specifically reference one of those courses. For example, if your statistics department offers a course called STAT*200, and your math department offers a course called MATH*301, and both courses cover the exact same content, you may wish to allow students to use STAT*200 to satisfy requirements which were written as "TAKE MATH*301" (and vice-versa). Then simply pull each course up in turn and assign them the same equate code. The code you use doesn't matter, as long as it is the same code in both courses.

When evaluating requirements, the system will now look for either course ID in the student's record. Using equate codes also allows the system to enforce repeat and registration policies.

Equate codes are multivalued. A course can be associated with more than one of them. This was done with the intent that the system would handle splits and merges. For example, if you used to offer CALCULUS as a one semester 6 credit course called MATH*130, but at some time split the course into two 3-credit courses called CALCULUS I (MATH*125) and CALCULUS II (MATH*126), then you can identify this split by use of equate codes. Simply create an equate code for each of the 3-credit courses, and assign them both to the 6-credit course. For example, assign math*130 two equate codes, CLC-1 and CLC-2; assign math*125 a code of CLC-1; and assign math*126 a code of CLC-2. If you think of the equate codes as representing course content, you can see how this naturally represents the splitting of the course.

Unfortunately, the proper handling of splits and mergers turns out to be incredibly difficult. For example, lets say a student took the 6-credit course, got a grade of "C", and wanted to improve his grade by repeating it. If he then took the 3-credit course MATH*125 and received an "A", and your institution is using the "best grade" repeat policy, what exactly does this mean? Do we split the credits? What is the overall effect on GPA? The complexities turned out to be greater than Datatel was prepared to handle with releases 14+. Therefore, although releases 14+ provide you with a mechanism for identifying splits and mergers, they aren't really being handled by the system.

The one exception to this is in academic requirement evaluation (DA and prerequisites). Here splits and mergers are recognized, but only in a very limited way. If a course is required, the system will look in the student's record for that course or any other record that supplies the same equate code. If the requirement specifies "Take math*125" (one of the 3-credit courses), and the student took math*130 (the 6-credit course), then the system will mark the requirement satisfied with math*130. The system is actually looking for either the math*125 course, or any other course that supplies the CLC-1 equate code.

Even academic requirement evaluation does not handle splits and mergers perfectly. Had the requirement been specified as "Take math*130", and the student had taken the

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math*125/126 series, the system is not sophisticated enough to recognize that the requirement should be satisfied. **The system does not yet allow two courses to satisfy a single course.** Even though Colleague does not yet fully handle splits and mergers, you should probably go ahead and identify them using equate codes. This way you not only take advantage of the requirement evaluation processing, but you also set yourself up for possible future Colleague enhancements in this area.

One final word on equate codes: You can take advantage of the fact that equate codes can be multivalued in order to enforce non-reciprocal equates. For example, if you want STAT*100 to satisfy "TAKE MATH*100", but not vice-versa. To handle this, assign math*100 a single equate code, and assign stat*100 two equate codes, one of which is the one from math*100. This way the stat course supplies the equate code needed by "take math*100", but the math course does not supply the two equate codes needed by "take stat*100".

What About Departments?

It is important to understand that equate codes make courses interchangeable, NOT departments or subjects. An academic requirement defined as "Take 1 course from department MATH" will not be satisfied by STAT*100, even if STAT*100 equates to a math department course.

If you want a course to be able to satisfy requirements of either department, you need to define the course (and all its sections) as associated with multiple departments. First pull up each of the courses in CRSE (course definition), and associate each course with both departments. Note that in CRSE, you can specify a departmental percentage of responsibility. For the purpose of academic requirements evaluation, these percentages don't matter. If you like you can give the second department a zero percentage (this alleviates inter-departmental politics). The departments listed in the COURSES record will default into any COURSE.SECTIONS record created FROM NOW ON.

In turn, when a student then registers for that section, its departments will get copied into his transcript record (his STUDENT.ACAD.CRED record). Now that you have equated the courses, and defined them and their course sections as multi-departmental, any student who registers for either course FROM NOW ON, will have the course recorded in his records as associated with both departments. It will thus satisfy requirements for either department.

You may have surmised from the capitalized text in the above paragraph that students who already have the course in their records (already registered or graded), will NOT have it listed as multidepartmental. A utility can be downloaded from AnswerNet that will update the STC.DEPTS field of multidepartmental courses for all students who took them in the past. Download document 1239.

Where Does Cross-Listing Fit In?

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Cross-listing one section to another really has no bearing whatsoever on the system's ability to recognize courses as having the same content, and to therefore use them interchangeably to satisfy requirements (note that it is sections that are cross-listed, not courses.) However, since cross-listing seems intuitively related to the notion of equated courses, there may be some confusion that is worth clearing up here.

Think of cross-listing as **simply a mechanism by which the system can keep track of room capacity**. It prevents overbooking when two sections are scheduled for the same room at the same time. Cross-listing a section of one course to a section of a different course simply tells the system that the two sections are being held together in the same classroom at the same time. Cross-listing allows the system to keep counts of empty seats for the sections synchronized with the seating limits of the classroom.

What cross-listing does NOT do is identify the two sections as having the same course content. However, since cross-listed sections are usually taught by the same instructor at the same time, the content for each section is usually identical. Therefore, it is very common to set both courses up with the same equate codes (thus making all their sections interchangeable for satisfying requirements). However, the system does not automatically equate two courses if you cross-list their sections – you need to do that separately.

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Repeat, Retake, or Replace – What is it?

In Colleague, we use the terms repeat, retake, and replace, and many people are confused by these very similar terms that actually refer to three different functions. This document is an attempt to clarify the difference in the three terms and to review setup in the system that affects each of these processes.

Repeat

Colleague considers a course a repeat when it finds the same course ID or an instance of an equated course in the STUDENT.ACAD.CRED file for a student. Any of those courses that have been graded in some way – even those graded with a W of some kind – are added to a list. This list, called STC.REPEATED.ACAD.CRED, is used in some way in each of these three functions, so you will find the term “repeat” appearing frequently.

NOTE: When courses are equated, Colleague considers them as the same course and therefore considers them in the repeat process. When a course has more than one equate code, however, then any course equated with it must also share the same list of equate codes to be considered in repeat processing. The Degree Audit module considers what we call “nonreciprocal equates” – courses that share one equate code but not all others associated with the courses – but the repeat process does not.

When the repeat process appears not to be working correctly, the discussions below will help you identify the potential areas to troubleshoot.

Retake

When a course is developed, two fields on the Course Restrictions screen (CRSE > CRES) that must be defined are:

- Reg Retake Policy
- Count Retakes for Credit

In the example below, the Reg Retake Policy is (R2) Repeat 2 Times and Count Retakes for Credit is No.

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CRES-Course Restrictions

Course: HIST-100 World History to WWII Status: Active

Default Capacity	<input type="text" value="30"/>	
Schedule Capacity	<input type="text" value="35"/>	
Minimum Enrollment	<input type="text" value="10"/>	
Reg Restrictions	<input type="text" value="1"/>	
Other Restrictions	<input type="text" value="1"/>	
Locations	<input type="text" value="1"/>	
	<input type="text" value="2"/>	
Reg Retake Policy	<input type="text" value="R2 Repeat ZX"/>	
Count Retakes for Credit	<input type="text" value="No"/>	
Equipment/Quantity	<input type="text" value="1"/>	
Supplies	<input type="text" value="1"/>	
Room Characteristics	<input type="text" value="1"/>	
Room Types	<input type="text" value="1"/>	
Instructor Consent	<input type="text" value="No"/>	
Petition Required	<input type="text" value="No"/>	
Allow Audit	<input type="text" value="Yes"/>	
Only Pass/No Pass	<input type="text" value="No"/>	
Allow Pass/No Pass	<input type="text" value="Yes"/>	
	Allow Waitlist	<input type="text" value="Yes"/>
	Waitlist Rating	<input type="text"/>

Reg Retake Policy

Retake Policies are defined on RPOL. Policies defined on this screen and then attached to a course on CRES are used in registration processing to control how many times a student may register for a course.

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Notice the definition of the R2 Retake Policy on RPOL. This setup indicates that a student may **register** a total of three times for a course section with this Retake Policy.

RPOL-Retake Policies

Reg Retake Policy: R2

Description Repeat 2X

Number of Times 3

Grade Scheme UG Undergraduate

Grades Allowed

1	
2	

Grades Not Counted

1	W
2	AU

Subroutine

This process uses the STC.REPEATED.ACAD.CRED list to count the instances of the course for the Reg Retake Policy defined on RPOL, taking into consideration any “Grades Allowed” or “Grades Not Counted” specified for that policy. Courses in which a student enrolled and subsequently dropped without a grade are not counted toward the number of times the student has taken the course.

If necessary, a subroutine may be applied to define the Reg Retake Policy.

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The Reg Retake Policy code on the CRES screen defaults to any sections created while the code is attached to the course. It is retained on the Section Restrictions screen (SRES) even though the field at the course level might subsequently be changed. Notice that the Reg Retake Policy field on SRES is “grayed out” and therefore cannot be changed at the section level.

The screenshot shows the SRES-Section Restrictions interface for section HIST-100-1. The top blue bar displays: Section: HIST-100-1, Title: World History to WWII, Term: 2002/, Synonym: 00709, Status: Active, Status Date: 07/11/02. Below this, various fields are listed with their values and controls:

Section Capacity	30	[Calendar]
Schedule Capacity	35	[Calendar]
Minimum Enrollment	10	[Calendar]
Reg Restrictions	1	[Dropdown]
Other Restrictions	1	[Dropdown]
Reg Retake Policy	R2 Repeat 2X	[Disabled]
Equipment/Quantity	1	[Dropdown]
Supplies	1	[Dropdown]
Room Characteristics	1	[Dropdown]
Room Types	1	[Dropdown]
Instructor Consent	No	[Dropdown]
Petition Required	No	[Dropdown]
Allow Audit	Yes	[Dropdown]
Only Pass/No Pass	No	[Dropdown]
Allow Pass/No Pass	Yes	[Dropdown]
Allow Waitlist	Yes	[Dropdown]
Waitlist Maximum		[Calendar]
Waitlist Rating		[Dropdown]
Cross-Listings		[Dropdown]

NOTE: Should you create sections and then realize there was an error in the Reg Retake Policy at the course level (i.e. the wrong policy or no policy was attached), you would need to cancel the sections and rebuild them when the correct Retake Policy is attached to the course.

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For retake policies to be checked in the registration process, the Check for Repeats field for the registration control code in use during the session must be set up correctly. The registration control being used in a session will always be displayed in the upper right hand corner of the RGN screen. Note that the UG registration control will be used in the registration session opened below.

The screenshot shows the RGN-Registration interface. At the top, it displays 'UG' in the upper right corner. Below this, student information is shown: 'Hendriksma, Ms. Susan A.' with ID '000446', and contact info 'Fairfax VA 22033-9876 So'. A date field is set to '07/11/02'. Below the student info, there are fields for 'Section Name and Title', 'Aud', 'Creds', 'CEUs', 'Stat', 'Date', and 'Term'. A table with one row is visible, containing the number '1' in the first column.

Registration Controls are set up on the RGCT screen. The Check for Repeats flag must be set to Yes for the appropriate registration period. The UG Registration Control defined below is set to check for repeat courses in each of four registration periods.

The screenshot shows the RGCT-Registration Controls interface. At the top, it displays '*** UG ***'. The main area contains several fields and checkboxes:

- Description: Undergrad Reg Control
- Section LookUp Restrictions: 1
- Student LookUp Restrictions: 1
- Restrict Lookup by Staff Location: For Sections [], For Students []
- Registration Parameters: [X] []
- Registration Process Rules Checks:

	Prereg	Reg	Add/Drop	Other
Student Eligibility	Yes	Yes	Yes	Yes
Rules 1 RG.LIB Library Hold Rule	[]	[]	[]	[]
Course Eligibility	Yes	Yes	Yes	Yes
Rules 1	[]	[]	[]	[]
Completion Eligibility	Yes	Yes	Yes	Yes
Rules 1	[]	[]	[]	[]
Check for Repeat Courses	Yes	Yes	Yes	Yes
Check for Prerequisites	Yes	Yes	Yes	Yes
Prerequisite Statuses Allowed 1 P Pending	[]	[]	[]	[]
Check for Corequisites	Yes	Yes	Yes	Yes
Allow Enrollment in Waitlisted Courses	No	No	No	No
Check for Petitions	Yes	Yes	Yes	Yes
Check Section Restrictions	Yes	Yes	Yes	Yes

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The registration control code defined on RGCT is attached to a user group code on the Registration Users (RGUS) screen, and individuals are assigned to that User Group. In the User Group defined below, the UG Registration Control is one of several assigned, and M. Smith is currently the only user assigned to this group. When M. Smith enters the RGN screen, she will select the Registration Control to be used during that session. When she uses the UG control, we know from the setup of that control that repeats WILL be checked.

The screenshot shows the 'RGUS-Registration Users' window with a blue header bar that reads 'Reg User Group: SUPER'. Below the header, there are several configuration sections:

- Reg Process Permitted:** Three dropdown menus with values '1 P Preregis', '2 R Registra', and '3 A Add/Drop'.
- Reg Controls:** Two dropdown menus with values '1 NAMELESS Nameless Reg Control' and '2 UG Undergrad Reg Control'.
- Print Parameters:** A checkbox labeled 'X'.
- Staff Group Members:** A table with three rows. The first row contains '1 0000036 MKS - M. Smith' and empty 'Start' and 'End' date fields. The second and third rows are empty.
- Override Permissions:** A table with columns for 'Prereg', 'Reg', 'Add/Drop', and 'Other'.

Override Permissions	Prereg	Reg	Add/Drop	Other
Student Eligibility Rules	Yes	Yes	Yes	Yes
Course Eligibility Rules	Yes	Yes	Yes	Yes
Completion Update Rules	Yes	Yes	Yes	Yes
Repeat Courses	Yes	Yes	Yes	Yes
Prerequisite Courses	Yes	Yes	Yes	Yes
Corequisite Courses	Yes	Yes	Yes	Yes
Enrollment in Waitlisted Courses	Yes	Yes	Yes	Yes
Petitions	Yes	Yes	Yes	Yes
Section Restrictions	Yes	Yes	Yes	Yes

When repeats ARE being checked, the user will receive a message like the one below if the student has reached the maximum number of retakes.



If the user has permission to override this warning (also defined on RGUS), she can click on OK and the registration will be permitted in spite of the policy. If the user did NOT have permission to override, the registration would not be permitted.

If the Check for Repeats field has NOT been set properly on the control assigned to the user, no message regarding repeats will be given during the registration process.

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NOTE: The Reg Retake Policy simply defines how many times a student is permitted to **register** for a course. If Check for Repeats is set to No for the control group the user is operating under **or** the retake message is overridden, the student may exceed the maximum retakes and will earn credit for the course as usual. The Retake Policy does NOT determine whether an instance of a course will be counted for credit.

Areas to troubleshoot when the Reg Retake function appears to be working improperly include:

- What Retake Policy is attached to the **section** in which the student is registering? Remember that the Retake Policy on the section (on SRES) may be different than the Retake Policy currently attached to the course on CRES.
- How is the Retake Policy defined on RPOL?
- What courses are being considered in the student's academic history toward the policy? When the student has been registered for the course in question, you will see the STC.REPEATED.ACAD.CRED list by detailing to the Student Course Repeat (STRP) screen from the appropriate course on STAC. Be sure to take into consideration only the appropriately graded courses.
- What registration control is being used and how is Check for Repeats set on RGCT?
- Does the user have permission to override a repeat on RGUS?

Count Retakes for Credit

This field on the CRES screen determines whether a course will be:

- Counted for credit when it is retaken
- Or
- Considered for replacement so credit is only retained for a single instance of the course

This field has an inverse relationship to a field populated in STUDENT.ACAD.CRED when a student registers for the course. If Count Retakes for Credit on CRES is set to No, then a field in STUDENT.ACAD.CRED called Replace Allowed will be set to Yes. If you **do** want the student to earn credit for the course each time it is taken, then you do **not** want the system to replace any instances of the course, so set the Count Retakes for Credit flag on CRES to Yes, and registrations will set the Replace Allowed field on SACT to No. If you do **not** want the student to earn credit for the course each time it is taken, then you **do** want the system to replace all but one instance of the course so credit

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is earned for only a single instance of that course. This is the most common scenario, and the Count Retakes for Credit flag on CRES should be set to No so registrations will set the Replace Allowed field on SACD to Yes.

You can see this relationship at work by noting the Count Retake for Credit flag on a particular course before enrolling a student in a section of that course. Check the STAC screen for that student, find the course in which the student just enrolled, and detail on Student Acad Credit Detail (SACD) for that course to observe that the Replace Allowed field in the lower right hand corner of the screen will be populated with a Yes/No value opposite that in the Count Retakes for Credit field on CRES.

The example below shows a course record for HIST-100 that was referenced earlier in this document with the Count Retakes for Credit flag set to No. Notice that the Replace Allowed field has been set to Yes.

The screenshot displays the 'SACD-Student Acad Credit Detail' window for student Hendriksma, Ms. Susan A. (ID: 0000446). The course is HIST-100 (World History to WWII) in the JAH department. The student is currently enrolled in the 100 First Yr section. The 'Replace Allowed' field is set to 'Yes', which is the opposite of the 'Count Retakes for Credit' field on the CRES screen mentioned in the text.

Course ID/Name/Sec	139	HIST-100	JAH
Title	World History to WWII		
Subject	HIST History		
Acad Lvl/Course Lvl	UG Undergraduate	100	First Yr
Departments	1 HIST History		
Credit Type	IN Institutional		
Start/End Dt	08/26/02	12/18/02	
Term/Reporting Term	2002/FA Fall Term		2002/FA Fall Term
Status/Dt/Time/Reason	1 N	07/05/02	09:57PM
Grade Scheme/Grade	UG Undergraduate		
Cred/Conversion	3.00000		Manual Cred
Att/Cmpl/GPA/Pts			
Cum Att/Cmpl/GPA/Pts			
Alt Att/Cmpl/GPA/Pts			
CEUs/Att/Cmpl			
Mark/Dt			
Mark Acad Credential	1		
Replaced Code			
Replace Allowed	Yes		
Notes/Comments			

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Replace

Remember that Colleague considers a course a repeat when it finds the same course ID or an instance of an equated course in the STUDENT.ACAD.CRED file for a student. The system adds all of these courses to a list called STC.REPEATED.ACAD.CRED, which we can see by detailing from the course on STAC to STRP.

When a student has repeated a course and the Replace Allowed field (on SACD) is set to Yes (because the Count Retakes for Credit field on CRES was set to No), the system must decide which instance of the course will be replaced. In the example below, the student took HIST-100 in 2002/WI and made a D. The student enrolled again in 2002/FA, dropped one section of the course and added another section. We know that one instance of the course will be replaced when the current course is graded because the Allow Replace field is set to Yes for each instance of the course.

STAC-Student Academic Credits		STRP-Student Course Repeat			
Hendriksma, Ms. Susan A.		ID: 0000446			
Fairfax	VA 22033-9876	So			
Course Name: HIST-100		Title: World History to WWII			
Course Name	Section	Status	Repl Code	Allow Repl	Grade
Title		Att Cred	Cmpl Cred	GPA Cred	Grade Points
Term		Cum Att Cred	Cmpl Cred	GPA Cred	Grade Points
	Alt	Cum Att Cred	Cmpl Cred	GPA Cred	Grade Points
1	HIST-100		New		Yes D
	World History to WWII	3.00	3.00	3.00	3.00000
	2002/WI Wintersession	3.00	3.00	3.00	3.00000
		3.00	3.00	3.00	3.00000
2	HIST-100	JAH	Delet		Yes
	World History to WWII				
	2002/FA Fall Term				
3	HIST-100	SAH2	Add		Yes
	World History to WWII				
	2002/FA Fall Term				

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Note that only when a verified grade is assigned is any attempt made to see which instance of a repeated course will be used for the purpose of calculating GPA. To decide how to set the Replace Code on SACD, the Repeat Grade Usage policy is checked on the grade scheme associated with the course. Based on the value of that field, the replaced instances have their Replace Code set to R. (Note that this means that courses that are considered repeats based on equate codes should have the same grade schemes, or results may vary depending on which of the student's courses is graded last.)

The Repeat Grade Usage of the UG grade scheme used by HIST-100 was BEST.

GRSC-Grade Schemes

Grade Scheme ID: UG

Description
 Start Date
 End Date

Repeat Grade Usage
 Repeat GPA Calc Custom Subroutine

	Grade	Value	Legend	Audit Grade	Pass Grade	Drop/ Withdraw Grade	Inc Grade
1	A	4.00	Excellent	AU	P	WP	
2	B	3.00	Above Average	AU	P	WP	
3	C	2.00	Average	AU	P	WP	
4	D	1.00	Poor	AU	P	WP	
5	F	0.00	Failure	AU	F	WF	
6	P	0.00	Pass	AU	P	W	
7	S	0.00	Satisfactory	AU	P	WP	
8	W		Withdrawn			W	
9	I		Incomplete				F

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Therefore, when the student completes HIST-100 for the second time and receives an A, the D is replaced. Notice in the example below that the Replace Code field in the lower right hand corner on SACD has been marked with an R to indicate it has been “Replaced by Colleague.”

STAC-Student Academic Credits		SACD-Student Acad Credit Detail	
Hendriksma, Ms. Susan A. ID: 0000446			
Fairfax VA 22033-9876 So			
Course ID/Name/Sec	139	HIST-100	
Title	World History to WWII		
Subject	HIST History		
Acad Lvl/Course Lvl	UG Undergraduate	100	First Yr
Departments	1 HIST History		
Credit Type	IN Institutional		
Start/End Dt	12/27/01	01/18/02	
Term/Reporting Term	2002/WI Wintersession	2002RSP Spring Reporting	
Status/Dt/Time/Reason	1 N	07/05/02	03:23PM
Grade Scheme/Grade	UG Undergraduate	D	
Cred/Conversion	3.00000		Manual Cred
Att/Cmpl/GPA/Pts	3.00000	3.00000	3.00000
Cum Att/Cmpl/GPA/Pts	3.00000	3.00000	3.00000
Alt Att/Cmpl/GPA/Pts	3.00000	0.00000	0.00000
CEUs/Att/Cmpl			
Mark/Dt			
Mark Acad Credential	1		
		Replaced Code	R
		Replace Allowed	Yes
		Notes/Comments	

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Prior to replacement by Colleague, GPA calculations for the 2002/WI instance of the course appeared as below:

Grade Scheme/Grade	UG Undergraduate				D
Cred/Conversion	3.00000				Manual Cred
Att/Cmpl/GPA/Pts	3.00000	3.00000	3.00000	3.00000	3.00000
Cum Att/Cmpl/GPA/Pts	3.00000	3.00000	3.00000	3.00000	3.00000
Alt Att/Cmpl/GPA/Pts	3.00000	3.00000	3.00000	3.00000	3.00000

After the repeat was graded and the system determined that the D grade should be marked as Replaced, the totals were adjusted:

STAC-Student Academic Credits		STRP-Student Course Repeat			
Hendriksma, Ms. Susan A. ID: 0000446		Fairfax VA 22033-9876 So			
Course Name: HIST-100		Title: World History to WWII			
Course Name	Section	Status	Repl Code	Allow Repl	Grade
Title		Att Cred	Cmpl Cred	GPA Cred	Grade Points
Term		Cum Att Cred	Cmpl Cred	GPA Cred	Grade Points
	Alt	Cum Att Cred	Cmpl Cred	GPA Cred	Grade Points
1	HIST-100	New	R Replaced by Collea	Yes	D
	World History to WWII	3.00	3.00	3.00	3.00000
	2002/WI Wintersession	3.00	3.00	3.00	3.00000
		3.00	0.00	0.00	0.00000
2	HIST-100 JAH	Delet		Yes	
	World History to WWII				
	2002/FA Fall Term				
3	HIST-100 SAH2	Add		Yes	A
	World History to WWII	3.00	3.00	3.00	12.00000
	2002/FA Fall Term	3.00	0.00	0.00	9.00000
		3.00	3.00	3.00	12.00000

You can see that the totals in the altcum line (the third line of calculations) for the D grade have been adjusted. The totals in the cum and altcum lines (the second and third lines) for the A grade are set to compensate for previous totals.

Users can affect the replacement algorithm by manually setting the Replace Allowed field on SACD. If changed from Yes to No, it means that the record is never to be replaced. The record is still used for the purpose of determining how many times a student can enroll in the course, but it will never be replaced by another instance of the same course for the student.

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Note also that the Repeat Policy noted on the Institutional Hierarchy Defaults (IDEF) screen can also affect replacement when “no grade” courses are involved. Courses that are never expected to get a grade have no grade scheme associated with them. If the system does not find a default grade scheme on IDEF as a reference for the repeat policy, it will use the policy of LAST.

Areas to troubleshoot when the Replace function appears to be working improperly include:

- Are Replace Allowed flags set properly on the affected records in STUDENT.ACAD.CRED? (If Replace Allowed flags are set improperly, check to be sure that Count Course for Retake flags in the COURSES file are set properly.)
- If the courses involved are equated, do they have the same grade scheme so they share a common Repeat Policy?
- Has the Replace Allowed flag been changed manually or is the Manual Credit flag set to Yes on one of the affected records?
- Is the Default Grade Scheme on IDEF set properly?

Summary

When you first set up a course, you define the number of times a student may **register** for that course with the Reg Retake Policy you assign on CRES. This policy defaults to all sections of that course you create and it cannot be changed at the section level.

Whether or not registrations are checked for repeats is defined by Registration Controls. Registration Controls are assigned to Registration Users, and some users may be able to override the retake policy.

You also define whether a student can take a course for credit more than one time on CRES when you are setting up the course. When a student registers for a course, the definition of this field determines how a flag called Replace Allowed is set in the student’s academic history. If Count Retakes for Credit is No, the Replace Allowed flag in the student’s history will be set to Yes. If that course is repeated, all but one of the instances of the course will be replaced in the student’s history so only one retains credit. To determine which instance retains credit, the system will reference the repeat policy associated with the grade scheme of the course.

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South Dakota Colleague System Procedures

Course Maintenance in Colleague

When changes are made to a course at your institution – but the content of the course remains the same – you should change the appropriate information (i.e. course name, title, credits, etc.) on the course master file (CRSE). This document will walk you through an example of a course name and title change that will attempt to answer commonly asked questions about course maintenance and timing issues related to making changes.

For complete information on course maintenance, please see the document “Course Name versus Course ID in Releases 14+.”

The Scenario

Assumptions for the example used in this document are as follows:

- A course now known as ENGL-1050, Principles of English, with Course ID 36 is to be changed to ENGL-1051, Freshman Composition I, effective with the upcoming Fall term. The content has not changed – just the name and title. ENGL-1050 and ENGL-1051 should be used in the same way in degree requirements, prerequisites, and equivalencies, and they should be viewed as repeats of one another.
- Summer sections need to be built under the old course name, and fall sections need to be built under the new course name.
- The summer and fall schedules must be built in a similar time frame to accommodate getting printed schedules out in a timely manner.
- Summer registration starts either during the time you are building the fall schedule or after it must be built. The timing of the name change is therefore critical.

Build the Summer Schedule Before Any Name Changes Are Made

Summer sections should be created with the current course name and title, ENGL-1050. When students begin registering for one of these sections **prior to the course name change**, the current name and title writes into their STUDENT.ACAD.CRED (STC) record at the time of registration.

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STAC-Student Academic Credits		SACD-Student Acad Credit Detail	
Hendriksma, Ms. Susan A.		ID: 0000446	Staff
Fairfax	VA	22033	
Course ID/Name/Sec	36	ENGL-1050	01
Title	Principles of English		
Subject	ENGL English		

Change the Course Name Before Building the Fall Schedule

To change the course name, simply pull up the course on the CRSE screen, and change the course number and title fields to reflect the new information.

CRSE-Courses			
Course: ENGL-1051		Title: Freshman Composition I	
Depts/Percent	1 ENGL English	100.00	
Subject	ENGL English	National ID	23.0101 Engli
Course Number	1051	Local IDs	1 150100
Eff Dates	05/01/90	Locations	1
Credit Type	IN Institutional	Course Types	1 STND Standard
Min/Max/Incr	3.00000	Topic Code	
CEUs		Course Sec	2
Course Levels	1 100 First Yr	Pgm Impact	0
Acad Level	UG Undergraduate		
Grade Scheme	UG Undergraduate		
Short Title	Freshman Composition I		
Long Title	1 Freshman Composition I		
Description	1 This is a beginning composition course.		
Status	A Active	Status Dt	10/08/01
Appr Agency	Datatel Univers	Appr Person	
Appr Dt	10/08/01		
Offering Info	<input checked="" type="checkbox"/>	Restrictions	<input checked="" type="checkbox"/>
Requisites	<input type="checkbox"/>	Financial Info	<input checked="" type="checkbox"/>
		Billing Info	<input checked="" type="checkbox"/>
		Additional Info	<input checked="" type="checkbox"/>

Sections built after the name change will have the new course name, ENGL-1051, and the new course title, Freshman Composition I. **However**, be aware now that you have sections under this course record with two different names and titles, as shown below.

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<input type="checkbox"/>	1: ENGL	1050	01	2003/S1 Principles of English	
				Active	05/19/03
<input type="checkbox"/>	2: ENGL	1051	01	2003/FA Freshman Composition I	
				Active	08/25/03

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Also be aware, that, if you are processing summer registration after the course name is changed, there will be an undesired result in student registration for summer sections. See Answernet document 7874.04 for details of this current bug and directions to clean up STC records after the end of the registration period.

Current STUDENT.ACAD.CRED Problem

Due to the way the STUDENT.ACAD.CRED record is currently built for a section enrollment, the course name comes from the course rather than the section. This is recognized as a design issue that needs to be resolved in the Answernet document referenced above. You will see the following results after you change the name of a course but have students still registering for sections of that course under the old name.

When a student is registered for the summer section (2003/S1 ENGL-1050-01), the section appears in the resolution list and on the RGN screen with the correct name (ENGL-1050).

Swanson, Mr. Albert		ID: 0000304 SSN: 233-01-0008 Student		NAMELESS	
Ann Arbor MI 49235					
Date	04/18/03	Term	2003/S1	Pass	
Section Name and Title	ENGL-1050-01 Principles of English	Aud		Creds	3.00
		CEUs		Stat	N
				Date	05/19/03
				Term	2003/S1

However, when you check the entry in STUDENT.ACAD.CRED, you will find that it has written in the NEW course name (ENGL-1051). The title is reflected accurately as the old title, but the name is derived in this field from the course record and thus erroneously returns the new course name.

Course ID/Name/Sec	36	ENGL-1051	01
Title	Principles of English		
Subject	ENGL English		

Compare the record above to the record of a student registered in the same section prior to the course name change.

Course ID/Name/Sec	36	ENGL-1050	01
Title	Principles of English		
Subject	ENGL English		

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When the Registration Period Ends, Correct the STC Records Affected

As soon as the current registration period ends, your technical team should follow the instructions in Answernet document 7874.04 to clean up records affected by this issue if your transcript print uses STC.COURSE.NAME or you need to comply with some of the other considerations noted in the document. Otherwise, you will have students who will have the new course name (which was approved as a change effective fall term) for a summer section of the course. (If your transcript print subroutine uses STC.STUDENT.COURSE.SEC to get to STUDENT.COURSE.SEC, and then uses SCS.COURSE.SECTION to get section information including SEC.NAME to print the section name, transcripts are not an issue.) Transcripts often print directly from STC, so the entries will likely need to be correct and consistent.

Creating Sections with the Old Name After a Course Name Change

You will not want to create any new sections needed for the summer from the CRSE screen, because they will then be created with the new name. Use SCOP – the Section Copy screen – and enter the old course name in the lookup to select an appropriate section for the copy base.

The screenshot shows the SCOP-Section Copy interface. At the top, there are fields for Course Name, Copy From Section, Term, and Start/End Dates. Below these are fields for New Section, Status/Date, and Synonym. The main area is a table with columns: Faculty Member (St, Dt, End Dt), Contr Type, Instr, Meth, Position, Percent, Contr, Load, Teach Arrgt, and Load Period. A dialog box titled 'Course Section LookUp' is open, showing a search field with 'engl 1050' and buttons for OK, Cancel, Detail, Finish, and Help.

When you select an ENGL-1050 section from the resolution list and return to SCOP, the header will show the new course name, but the copy will be produced with the old course name.

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Tracking Changes to Courses

To track changes to courses, you should define the fields you want to track on DHST – the Define Field History screen (UT>System File Administration). In the example below, the COURSES file is set up to track the credit, title, name, and description fields. Changes to these fields will be captured and stored for historical purposes.

DHST-Define Field History				
File: COURSES				
Fields	Require Reason	User-Defined	Deletable	
1 CRS.MIN.CRED	Yes	No	Yes	
2 CRS.TITLE	Yes	No	Yes	
3 CRS.SHORT.TITLE	Yes	Yes	Yes	
4 CRS.NAME	Yes	Yes	Yes	
5 CRS.NO	Yes	Yes	Yes	
6 CRS.SUBJECT	Yes	Yes	Yes	
7 CRS.DESC	Yes	Yes	Yes	
8				

With field tracking history turned on, you can use the RBFH (Rebuild File History) screen to see how a course looked on a given date. In the example below, notice that, when prompted for course ID 36 with a date prior to the changes made to the ENGL course, RBFH shows us that the previous name and title were ENGL-1050, Principles of English.

4	CRS.NAME	ENGL-1050	1
5	CRS.DEPT.PCTS	10000	1
6	CRS.SESSION.CYCLE		0
7	CRS.YEARLY.CYCLE		0
8	CRS.EQUIPMENT.QTY		0
9	CRS.EQUIPMENT.REQD		0
10	CRS.DESC	This is a beginning composition cou	1
11	CRS.SHORT.TITLE	Principles of English	1

When field tracking is set up on fields, you can also detail from this screen to see historical changes to those fields as well as when and by whom changes were made. See “Tracking Field History in Colleague” for additional information on setting up the field tracking feature.

Additionally, remember that you can detail from the CRSE screen to look at sections to see the historical changes to a course. And, if you want more information about changes accessible within the COURSES file, you might consider using the CRS.COMMENTS field to make notes of changes as well.

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Summary

When course information changes (i.e. name, title, credits, etc.), ask the following questions to determine whether you should create a new course or simply change information on the existing course file.

- Should the course continue to be used in the same way in program requirements, course prerequisites, and/or equivalencies?
- Should instances of the course taken before and after the change by one student be considered a repeat?

If the answer to all of these questions is yes, then you should simply change the appropriate information on the existing course file as this document describes. Consider the timing for the change and its implications in building sections.

- Build the schedule for any terms needed under the old course name.
- Change the course name before building the schedule for terms needed under the new course name.
- If, due to the timing of registration activity, additional sections are needed under the old course name, use Section Copy (SCOP) to create those sections.
- If you have students registering for sections with the old course name, recognize that STUDENT.ACAD.CRED records for those students will be affected by the name change. When registration for any sections with the old course name has ended, use instructions in AnswerNet document 7874.04 to clean up affected records.

Making changes on the course master file keeps all references to a course for which **the content has stayed the same** under one record identifier (the course ID).

After you have changed the name of a course, you will not be able to look it up on the CRSE screen under that name. However, you can track changes to a course in several ways:

- Set up DHST, Define Field History for the COURSES file. This will allow you to use the course ID to look up the historical record of a course on RBFH, Rebuild File History and/or query the COURSES.HIST or COURSES.HIST.LOG files for information on changes.
- From the CRSE screen, you can detail to view the sections associated with a course record to see how the course name (reflected in the section name) might have changed over time.

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- Use CRS.COMMENTS under Additional Info on CRSE to store notes of changes made to a course.
- When viewing a student record with an old name, remember that you can use the course ID to look up the current version of the course on the CRSE screen.

The fact that a course no longer appears on resolution screens stops it from being selected inappropriately for equivalencies or other uses. This method of maintenance also prevents overuse of equate codes, which may ultimately affect system performance.

Students who take a course with the same content but different names will always have the name of the course **when they took it** preserved in their STUDENT.ACAD.CRED records so it will print correctly on their transcripts. However, they will all have the same course ID referenced in that record so degree audit requirements and prerequisites looking for that course find the record – regardless of the course name.

And **perhaps the most compelling reason** to make the change on the course master file is the fact that anywhere that course ID has been used in a degree requirement, prerequisite, or equivalency, the new course name will **automatically** display.

There are MANY advantages of making changes on the course master file versus creating a new course and equating it to an old version of the course. See “Course ID versus Course Name in Colleague 14+” for more information.

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Glossary

Corequisite:

A corequisite that applies to all universities offering the course is added centrally at the Course Level on the CREQ screen on Colleague. Corequisites can only be listed as specific courses. They cannot be written in syntax and therefore do not permit an “and” and an “or” relationship. A corequisite is a course that can be taken concurrently with this course (set to “Yes”) or previously or concurrently with this course (set to “No). Corequisites are always course related, not student related.

Corequisites added at the Course Level default to all sections of the course.

Corequisites can be changed at the Section Level for specific sections by a university after receiving the appropriate approval.

A corequisite that applies to only some of the universities should be added initially at the Section Level by the specific university after receiving the appropriate approval.

COURSE TERMS FOR CORRESPONDENCE & INTERNET ASYNCHRONOUS

Term-Based Courses (Standard Term)

Courses that are offered in a pre-determined period of time (Fall, Spring, or Summer Term) and begin and end within that period of time. Students must be registered for term-based courses prior to the census date of that particular term.

Non-Term Based Courses (Non Standard Term)

Courses that are offered in various lengths of time and that begin or end outside the Standard Term.

Internet Asynchronous Courses

Courses where the student and instructor are interacting at different times – there is no set time for interaction. These courses, that usually begin and end at any time, must be term-based to qualify for financial aid.

INSTRUCTIONAL METHODS

SEMINAR

A highly focused and topical course. The format includes student presentations and discussions of reports based on literature, practices, problems, and research. Seminars may be conducted over electronic media such as Internet and are at the upper division or graduate levels. Enrollment is generally limited to fewer than 20 students

Instructional method type is “E”.

Independent Study

Includes **Directed Study, Problems, Readings, Directed Readings, Special Problems, and Special Projects.**

Students complete individualized plans of study which include significant one-on-one student-teacher involvement. The faculty member and students negotiate the

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details of the study plans. Enrollments are usually 10 or fewer students. Meeting depending upon the requirements of the topic.

Instructional method type is “I”.

Topics

Includes **Current Topics**, **Advanced Topics** and **Special Topics**.

A course devoted to a particular issue in a specified field. Course content is not wholly included in the regular curriculum. Guest artists or experts may serve as instructors. Enrollments are usually of 10 or fewer students with significant one-on-one student/teacher involvement.

Instructional method type is “X”.

Workshop

Special, intense sessions in specific topic areas. Approximately 45 hours of work is required for each hour of credit. Workshops may vary in time range but typically use a compressed time period for delivery. They may include lectures, conferences, committee work, and group activity.

Instructional method type is “W”.

Internship

Applied, monitored and supervised, field-based learning experience for which the student may or may not be paid. Students gain practical experience; they follow a negotiated and or directed plan of study. A higher level of supervision is provided by the instructor in these courses than is the case with Field Experience courses.

Instructional method type is “S”.

Practicum

Applied, monitored and supervised, field-based learning experience for which the student may or may not be paid. Students gain practical experience; they follow a negotiated and or directed plan of study. A higher level of supervision is provided by the instructor in these courses than is the case with Field Experience courses.

Instructional method type is “S”.

Field Experience

Applied, monitored and supervised, field-based learning experience for which the student may or may not be paid. Students gain practical experience; they follow a negotiated and or directed plan of study established between the student, instructor and field experience supervisor. Due to the presence of a field experience supervisor, a lower level of supervision is provided by the instructor in these courses than is the case with an Internship or Practicum course .

Instructional method type is “S”.

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Cooperative Education

Applied, monitored and supervised, field-based learning experience for which the student may or may not be paid. Students gain practical experience; they follow a negotiated and or directed plan of study established between the student, instructor and field experience supervisor. Due to the presence of a field experience supervisor, a lower level of supervision is provided by the instructor in these courses than is the case with an Internship or Practicum course . Instructional method type is “S”.

Undergraduate Research/Scholarship

Includes **Senior Project**, and **Capstone Experience**.

Independent research problems/projects or scholarship activities. The plan of study is negotiated by the faculty member and the student. Contact between the two may be extensive and intensive. Does not include research courses which are theoretical.

Instructional method type is “J”.

Prerequisite:

A prerequisite that applies to all universities offering the course is added centrally at the Course Level on the CREQ screen on Colleague. Prerequisites are specific courses or groups of courses that must be completed prior to taking the course for which they are entered. Prerequisites are written in syntax that permits an “and” or an “or” relationship between specific courses or specific groups of courses.

Examples of prerequisites are Take ENGL-101 and ENGL-303; Take ENGL-101 or ENGL-303; take ENGL-101, ENGL-303, and ENGL-203 and take ENGL-204, ENGL-205, or ENGL-206; Take ENGL-101, ENGL-303, and ENGL-203 or take ENGL-204, ENGL-205, or ENGL-206. These course can be further restricted with phrases such as “With minimum grade of C”. Prerequisites are always course related, not student related.

A prerequisite that applies only to some of the universities offering the course is added centrally at the Course Level on the XCLP screen on Colleague. These prerequisites can also be written in the syntax explained above.

Prerequisites added at the Course Level through either CREQ or XCLP default to all sections offered for the course. Prerequisites can be changed at the Section Level for a specific section(s) by a university after receiving the appropriate approval.

Registration Restrictions:

A registration restriction that applies to all universities offering the course is added centrally at the Course Level on the CRES screen on Colleague. A Registration Restriction is a requirement for the course that is not related to a specific course but defines a student attribute that must be met prior to registering for a course. These registration restrictions are written as rules. The registration restrictions that currently exist are:

- Admitted to Teacher Education
- Admitted Into Athletic Trng Pr
- Junior Class Standing
- Sophomore Class Standing

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- Senior Class Standing

A Registration Restriction that applies to only some universities offering the course should be added initially at the Section Level by the university after receiving the appropriate approval