

Student Information Systems



Degree Audit Module

Procedure Manual



South Dakota Colleague System Procedures

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Revisions with this Update

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Preface

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Colleague System Instructions

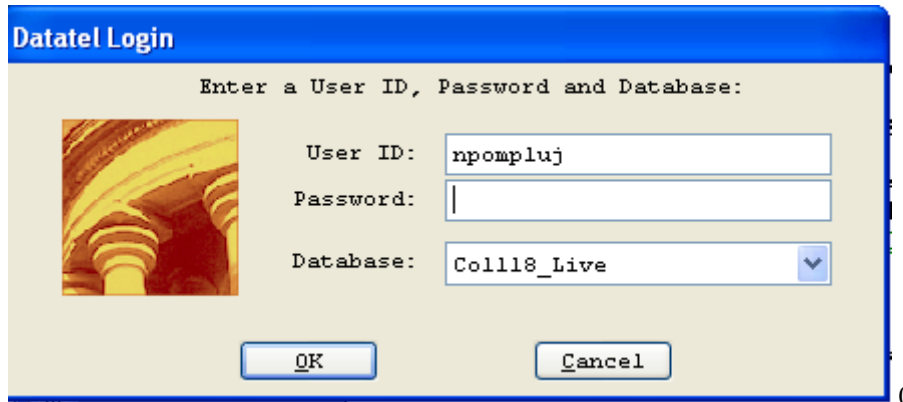
Responsibility: University

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.

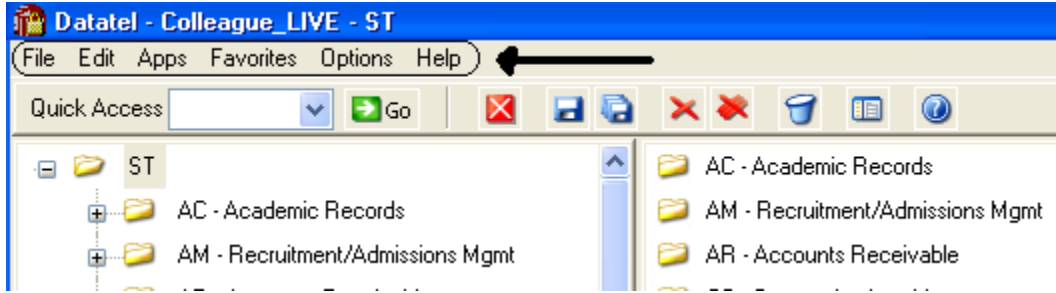
Password Change Requirements

- 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.

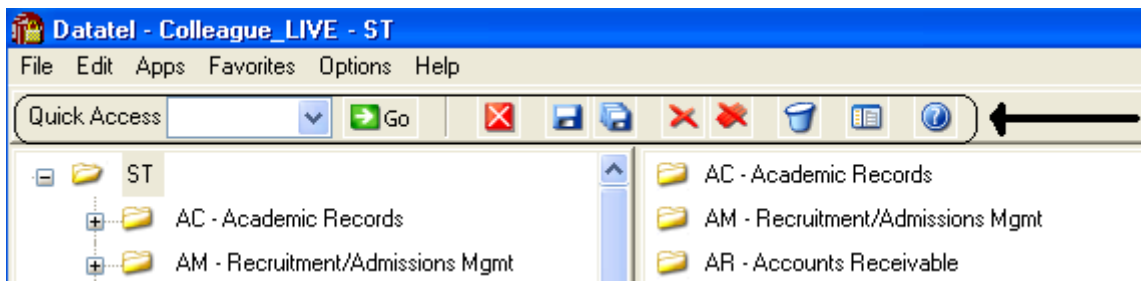
If you use a few screens often and want them on a separate list, click on **Favorites**, then **Add to Favorites**, then type in the mnemonic of the screen and click OK.

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.

10/30/08 – last update

- 10 –

Revisions approved through the Module → Module Coord Committee → UDA/SDA

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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.

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.

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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.

Other Searches

Course or Section Search

Enter XXXX-000-00

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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**]

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* [UNLIKE]

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

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security number is a unique identifier, we want to ensure that we have the correct number associated with that person.

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.

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

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- 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.
- 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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Degree Audit

Defining Catalog-Specific Program Characteristics

Responsibility: Home

Use the Academic Program Requirements (APRS) screen to define program characteristics which apply to a specific program/catalog combination.

Step 1 – Access the Academic Program Requirements (APRS) screen from the menu or from the Addnl Info field on the Academic Programs (PROG) screen.

Step 2 – Enter the Minimum Credits

- Enter the overall credits required for this program
- Enter the institutional credits required for this program

Step 3 – Enter the Minimum GPA

- Enter the overall GPA required for this program
- Enter the institutional GPA required for this program

Step 4 – Enter the Grade Scheme

- Enter UG for undergrad, GR for grad, MD for medical & LA for law

Step 5 – Enter the Minimum and Other Grades

- Enter minimum course grades that are required for this program
 - Note Minimum Grades vs. Other Grades in Degree Audit attachment.

Note: If you are experiencing repeats that are not working correctly and/or courses that are not pulling into degree audit requirements, use “Minimum Grade” rather than “Other Grades” in degree audit since Minimum Grade will look across your old and new grade schemes. The “Other Grades Allowed” entries will need to be removed on your degree audit requirements (on REQU and all programs for all catalogs on APRS). The following query will assist you in identifying the Other Grade entries.

For all * -- substitute your university identifier

```
SELECT ACAD.PROGRAM.REQMETS WITH ACPR.OTHER.GRADES WITH
ACPR.ACAD.PROGRAM LIKE '*...!'
LIST ACAD.PROGRAM.REQMETS BY ACPR.ACAD.PROGRAM BY
ACPR.CATALOG ACPR.ACAD.PROGRAM FMT'20L'
COL.HDG'PROGRAM' ACPR.CATALOG FMT'4L' COL.HDG'CATL' ID.SUP
HEADER'Programs with Other Grades to be removed' LPTR
```

```
SELECT ACAD.REQMT.BLOCKS WITH ACRB.ALLOWED.GRADES WITH
ACRB.ACAD.REQMT LIKE
'*...!'
LIST ACAD.REQMT.BLOCKS BY ACRB.ACAD.REQMT
ACRB.ACAD.REQMT FMT'30L' COL.HDG'RE
```

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REQUIREMENT' ID.SUP HEADER'REQUIREMENTS WITH OTHER ALLOWED GRADES TO REMOVE' LPTR

Note: The requirement entered here may be overridden at any other level in the hierarchy of Degree Audit specification.

- Program level - Academic Program Requirements (APRS) screen
- Requirement level - Academic Requirements (REQU) screen
- Subrequirement level - Subrequirement Specifications (SRSP) screen
- Group level - Subrequirement Specifications (SRSP) screen

Step 6 – Enter the Tran Group and Activity Eligibility Rules

- The transcript grouping for a program determines which courses will be included in a Degree Audit evaluation and which courses will appear on the student's transcript. For example, you may want to apply only undergraduate coursework completed at your institution to the Degree Audit evaluation.
- Enter a transcript grouping that applies to this program. Note the degree audit transcript groupings for each university.
- Enter rules to further limit the courses eligible to apply to this program
 - For example, a rule can be set up to have degree audit view STUDENT.ACAD.CRED for the individual's course levels.
 - RLDE ID example – U.UPFILT
 - Primary File View - STUDENT.ACAD.CRED
 - Criteria – WITH STC.COURSE.LEVEL EQ '300''400'

Step 7 – Enter the Requirements

- From this field, you can associate degree audit requirements to the program. If the course requirement does not exist in the database, you can define the requirement by detailing to the Academic Requirements (REQU) screen.
- See Associating Requirements to a Standard Academic Program for procedures

Note: 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 8 – Enter a Curriculum Track

Step 9 – Enter Student Selectable

- Enter Yes, if this program is available for student 'what-if' scenarios
- Enter No, if it is not

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Step 10 – Enter the Maximum Credits

- Enter the maximum credits allowed for this program
 - When this field is blank, it will populate automatically when you move your cursor to it with 150% of Minimum Credits. If you change Minimum Credits, you should field delete Maximum Credits to repopulate it correctly.
- Used in Financial Aid Satisfactory Academic Progress reporting

Step 11 – Detail to Review or Print Program Reqmts

Step 12 – Add Addnl Reqmts Print Location, if desired

- Detail to define the print locations of additional requirements

Step 13 – Update the APRS screen

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Associating Requirements to a Standard Academic Program

Responsibility: Home

You can list the requirements that define the program on the Academic Program Requirements (APRS) screen.

Step 1 - Access the Academic Program Requirements (APRS) screen from the menu, or by detailing from the Addnl Info field on the Academic Programs (PROG) screen.

- At the Academic Program LookUp prompt, enter the name of the program
- Use the university identifier and ... for a list
- A catalog resolution screen is displayed, select the catalog to define

Step 2 – Define the Minimum Overall and Institutional Credits required for this program

- For a four year degree, the minimum number of institutional credits in residence to graduate is 32.
- For a four year degree, the minimum number of overall credits to graduate starts at 128. Some programs require more. If so, enter the number required to graduate from that program.

Step 3 – Define the Minimum Overall and Institutional GPA

- The minimum overall and institutional GPA is 2.0

Step 4 – Define the Grade Scheme

- Grade scheme is UG for UG, GR for Grad, MD for Med, LA for Law

Step 5 – Define the Minimum and Other Grades

- Minimum Grade – enter the minimum grade allowed for this program
 - See Min Grade vs Other Grades in the Appendix for more information.

Step 6 – Define the Transcript Groupings

- Transcript groupings are smart coded by university
 - Naming convention is university -> DA -> level

Step 7 – Define Activity Eligibility Rules

- These rules must be defined against the STUDENT.ACAD.CRED file.
- Naming convention is university -> module -> name
- Enter rules to further limit the courses eligible to apply to this program. If there are courses in the transcript grouping used for this program that should NOT be applied to this program, you can specify those type of courses in a rule and attach it here. For example, if you want to see developmental courses on the audit, but you don't want them to be applied to requirements in the program, you can develop a rule that specifies: WITH STC.CRED.TYPE NE "(whatever the code is for developmental)" and attach it at the program level.

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Step 8 – Define the Requirements for this program

- You can list existing requirements, which make up the program in the Requirements field, or you can detail to the Academic Requirements (REQU) screen to create a new requirement.
 - If the requirement does not exist, the Record not found, Enter (A) to add prompt displays.
 - Enter A to add the smartcoded requirement
 - The Academic Requirements (REQU) screen displays
 - Define the following fields:
 - Title** – Enter the title of the requirement
 - Type** – Enter the type of the requirement; F1 twice for the table
 - Acad Level** – Enter the level of the program
 - Depts** – Enter the dept responsible for this requirement
 - Catalog** – Enter the catalogs to which this requirement belongs
 - CCDs, Majors, Minors, Specs** – Enter any that are associated with this program
 - Note:** The Acad Level, Depts, Catalog and CCDs, Majors, Minors, Spec fields are not required – and are not necessarily appropriate for some requirements which may be used in MANY programs and catalogs. The requirement itself will track for you the programs and catalogs it is assigned to on the lower part of the screen. The Major field should be populated if you want this requirement to contribute to a Major GPA.
 - Grd Scheme** – Enter the appropriate grade scheme
 - Min and Other Grades** – Enter the minimum grade allowed for this requirement ONLY if it is different than the minimum grade for the program it is attached to
 - See Min Grade vs Other Grade in the Appendix for more information.
 - Min GPA** – Enter the minimum GPA for this requirement ONLY if a GPA for courses applied to this requirement should be calculated.
 - Activity Eligibility Rules** – Enter any rules needed to further limit the courses eligible to apply to this requirement. Eligibility rules entered at this level will compound (be added onto) any eligibility rules entered at the program level.
 - Custom Student Pgm Use** – Enter Y if this requirement can be used as an add-on component when creating a custom program
 - Excl** – Enter the types of requirements **that may not share courses with those applied to this requirement.**
 - Additional Evaluation Parameters** – If there is more than one subrequirement in this requirement, and you want to specify that courses may not be re-used among those subrequirements, then detail to the Additional Evaluation Params (AEVP) screen. The Allow Course Reuse field defaults to "Yes." Set this field to No. (This is not necessary if there is only one subrequirement attached to the requirement. If the same

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course can be used to satisfy more than one subrequirement, then this should be set to Yes.)

Number Subreqmts Needed – Enter the number of subrequirements needed. Leave blank for All.

Subrequirements – Detail to Subrequirement Specifications (SRSP) screen to define/add subrequirements

- Define the following fields

Subrequirement Name - Every subrequirement must be identified by name. Subrequirement names will show on the audit – so the title should be user-friendly text.

Grade Scheme - The grade scheme information defaults from the previous screen and is the grade scheme associated with the requirement to which this subrequirement belongs.

Minimum Grade and Other Grades - Enter the minimum grade allowed for this requirement ONLY if it is different than the minimum grade defined in the requirement or the program it is attached to.

- See Min Grade vs Other Grade in the Appendix for more information.

Minimum GPA – Enter a minimum GPA IF one is needed for this subrequirement.

Activity Eligibility Rules - Enter any rules needed to further limit the courses eligible to apply to this subrequirement. Eligibility rules entered at this level will compound (be added onto) any eligibility rules entered at the requirement and/or program levels.

Additional Evaluation Parameters – If there is more than one group in this subrequirement, and you want to specify that courses may not be re-used among those groups, then detail to the Additional Evaluation Params (AEVP) screen. The Allow Course Reuse field defaults to "Yes." Set this field to No. (This is not necessary if there is only one group attached to the subrequirement. If the same course can be used to satisfy more than one subrequirement, then this should be set to Yes.)

Specification - This window requires the Degree Audit "TAKE" syntax. This is a collection of phrases that make up the detailed specification of this subrequirement's groups. The assembled text gets compiled into run-time tables. See the Degree Audit Learning Guide for more information about DA Syntax.

Print Text - You can enter text you want printed on the evaluation report. You can only specify this text at the subrequirement level. This means if you want text specific to a subrequirement to appear, you must type it here. The evaluation report will display this text prior to the entire subrequirement.

Note: The compilation of the syntax occurs on exit of the window. If error messages are detected, the UTEDIT screen appears in inquiry mode where you can read the description of the error. Upon exit from

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the UTEDIT screen, the specification window reappears with the cursor on the line in which the error occurred. This text is entered in flexible degree audit syntax. When you exit the screen, the text is broken up and stored in the ACAD.REQMT.BLOCKS file in its component pieces. When you reenter the screen, the text you typed no longer exists and is reconstructed by the system and displayed in a standard format. This means that if you type in your institution's specific syntax containing synonyms, and later return to the screen to modify it, it will not appear in the same text format; however, functionally it has not changed.

If you enter a course name in the specification text that is not unique, a message appears, then a course resolution screen will require you to choose the course that you intended to specify.

If the specification is being made for the first time and no printed text has been entered, upon exit from this window the system will duplicate the specified text in the printed text window. If printed text exists, the system will not rewrite it, even if changes are made to the specification text.

- To change requirements for a new catalog year, identify the portions of a program that have changed from one catalog year to the next.
 - Use APRS to delete the requirement in Requirement Field that no longer is correct and, if appropriate, replace it with a different existing requirement or create a new requirement to add.
- The requirements will print out on the evaluation report in the same order as you entered them in the Requirements field, however, they will not necessarily be evaluated in this order.
 - The order of evaluation is determined by the setup of the academic requirement types validation table.

Step 9 – Update through all the screens to the APRS screen

Step 10 – Define Student Selectable

- Enter Y if this program can be used in ‘What If’ scenarios in the online system
- This has no effect on the ‘What If’ scenarios in WebAdvisor

Step 11 – Define the Maximum Credits

- This is not used by Degree Audit; it is used by the Financial Aid Satisfactory Academic Progress (SAP) routines to calculate the rate at which the student is attempting (via cumulative attempted credits) to progress through the academic program.
- The rate may then be used to determine if the student is maintaining satisfactory progress to continue to receive financial assistance.

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- When this field is blank, it will populate automatically when you move your cursor to it with 150% of Minimum Credits. If you change Minimum Credits, you should field delete Maximum Credits to repopulate it correctly.

Step 12 – Define the Duration Hours

- Do not enter, not used by South Dakota.

Step 13 – Detail on Review Program Reqmts to view a listing of the requirements

Step 14 – Detail on the Addnl Reqmts Print Location to determine where additional CCDs, majors, minors, specializations should print on the evaluation

Step 15 – Update the APRS screen

Defining a Requirement

Responsibility: Home

Use the Academic Requirements (REQU) screen to define a standard requirement.

Step 1 – Access the Academic Requirements (REQU) screen

Step 2 – Enter the name of the requirement

- Enter A to add the smartcoded requirement

Step 3 – Enter the title

- Describe the code that has been determined by Type, Degree, Category, Year, etc.

Step 4 – Enter the type

- One, Two, Three, etc
- The requirement type code identifies the requirement's evaluation priority. Use the Validation Codes (VAL) screen to define a requirement type's evaluation priority (use the ACAD.REQMT.TYPES validation code table). When the system evaluates a program with multiple requirements, it uses this priority to determine in what order to evaluate the requirements.
- The requirement type code is also used when specifying exclusion logic for the requirement. Exclusion logic is defined in the excluded requirement types field (labeled "Excl Reqmt Type"). For more details, see the on-line help for that field.
- Even if you are not using the excluded requirement types functionality, you should still classify your requirements in a way that makes sense to your institution. You can use the requirement type code to help group your requirements for reporting purposes.

Step 5 – Enter the academic level

- UG, GR, LA, MD

Step 6 – Enter the majors

- This field is used to determine if courses applied to this requirement should be used to calculate a MAJOR GPA.
- If this field is left blank, then this requirement is NOT considered a Major requirement for purposes of calculating a major GPA. Note that this is true even if the requirement's type is 'MAJ'.

Step 7 – Enter the grade scheme

- UG, GR, LA, MD

Step 8 – Enter the min grade

- Enter the minimum grade allowed for this requirement ONLY if it is different than the minimum grade for the program it is attached to.
 - See Min Grade vs Other Grade in the Appendix for more information.

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Note: If you are experiencing repeats that are not working correctly and/or courses that are not pulling into degree audit requirements, use “Minimum Grade” rather than “Other Grades” in degree audit since Minimum Grade will look across your old and new grade schemes. The “Other Grades Allowed” entries will need to be removed on your degree audit requirements (on REQU and all programs for all catalogs on APRS). The following query will assist you in identifying the Other Grade entries.

For all * -- substitute your university identifier

```
SELECT ACAD.PROGRAM.REQMETS WITH  
ACPR.OTHER.GRADES WITH ACPR.ACAD.PROGRAM LIKE  
'* ... '  
LIST ACAD.PROGRAM.REQMETS BY ACPR.ACAD.PROGRAM BY  
ACPR.CATALOG ACPR.ACAD.PROGRAM FMT'20L'  
COL.HDG'PROGRAM' ACPR.CATALOG FMT'4L' COL.HDG'CATL'  
ID.SUP HEADER'Programs with Other Grades to be removed'  
LPTR
```

```
SELECT ACAD.REQMT.BLOCKS WITH ACRB.ALLOWED.GRADES  
WITH ACRB.ACAD.REQMT LIKE  
'* ... '  
LIST ACAD.REQMT.BLOCKS BY ACRB.ACAD.REQMT  
ACRB.ACAD.REQMT FMT'30L' COL.HDG'RE  
QUIREMENT' ID.SUP HEADER'REQUIREMENTS WITH OTHER  
ALLOWED GRADES TO REMOVE' LPTR
```

Step 9 – Enter the min GPA

- Minimum gpa for the requirement.
- Leave blank if no minimum

Step 10 – Detail to enter Act eligibility rules

- need rules to exclude remedial, excess of 64 from jr college

Step 11 – Enter Custom Student Pgr Use

- Enter Y

Step 12 – Enter Excl Requirement Type

- Enter the types of requirements with which this requirement may not share courses.
- The system will not allow courses used in those earlier requirements from being applied in this one also.

For example, this is used to set up a DA requirement that does not allow any required courses (for a major, gen ed, inst req) to count for that requirement. This

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is a requirement that is any course that was not required in the major, gen ed or institutional. If Type One is Gen ed, Two is Inst & Three is Major, adding One, Two, Three & Four here will tell DA which courses may not be used again. You need to add all the types that are used for the requirements between which courses may not be used again. If you only use FOUR here, it means that it cannot be used by another requirement with a type of FOUR, but it can be used by requirements that do not have the type of FOUR.

Step 13 – Detail to Add Eval Params

- If there is more than one subrequirement in this requirement, and you want to specify that courses may not be re-used among those subrequirements, then detail to the Additional Evaluation Params (AEVP) screen. The Allow Course Reuse field defaults to "Yes." Set this field to No.
- This is not necessary if there is only one subrequirement attached to the requirement. If the same course can be used to satisfy more than one subrequirement, then this should be set to Yes.

Step 14 – Enter Num Subreq Needed

- If there are multiple subrequirements, and the student does not need to complete all of them, enter the number he needs to complete.
- Leave this field empty (displays as "ALL") if all subrequirements must be met.

Step 15 – Detail to add Subrequirements

- Define the following fields
 - Subrequirement Name** - Every subrequirement must be identified by name. Subrequirement names will show on the audit – so the title should be user-friendly text.
 - Grade Scheme** - The grade scheme information defaults from the previous screen and is the grade scheme associated with the requirement to which this subrequirement belongs.
 - Minimum Grade and Other Grades** –Enter the minimum grade allowed for this requirement ONLY if it is different than the minimum grade defined in the requirement or the program it is attached to.
 - See Min Grade vs Other Grade in the Appendix for more information.
 - Minimum GPA** – Enter a minimum GPA IF one is needed for this subrequirement.
 - Activity Eligibility Rules** - Enter any rules needed to further limit the courses eligible to apply to this subrequirement. Eligibility rules entered at this level will compound (be added onto) any eligibility rules entered at the requirement and/or program levels.
 - Additional Evaluation Parameters** –If there is more than one group in this subrequirement, and you want to specify that courses may not be re-used among those groups, then detail to the Additional Evaluation Params (AEVP) screen. The Allow Course Reuse field defaults to "Yes." Set this field to No. (This is not

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necessary if there is only one group attached to the subrequirement. If the same course can be used to satisfy more than one subrequirement, then this should be set to Yes.)

Specification - This window requires the Degree Audit "TAKE" syntax. This is a collection of phrases that make up the detailed specification of this subrequirement's groups. The assembled text gets compiled into run-time tables. See the Degree Audit Learning Guide for more information about DA Syntax.

Print Text - You can enter text you want printed on the evaluation report. You can only specify this text at the subrequirement level. This means if you want text specific to a subrequirement to appear, you must type it here. The evaluation report will display this text prior to the entire subrequirement.

Note: The compilation of the syntax occurs on exit of the window. If error messages are detected, the UTEDIT screen appears in inquiry mode where you can read the description of the error. Upon exit from the UTEDIT screen, the specification window reappears with the cursor on the line in which the error occurred. This text is entered in flexible degree audit syntax. When you exit the screen, the text is broken up and stored in the ACAD.REQMT.BLOCKS file in its component pieces. When you reenter the screen, the text you typed no longer exists and is reconstructed by the system and displayed in a standard format. This means that if you type in your institution's specific syntax containing synonyms, and later return to the screen to modify it, it will not appear in the same text format; however, functionally it has not changed.

If you enter a course name in the specification text that is not unique, a message appears, then a course resolution screen will require you to choose the course that you intended to specify.

If the specification is being made for the first time and no printed text has been entered, upon exit from this window the system will duplicate the specified text in the printed text window. If printed text exists, the system will not rewrite it, even if changes are made to the specification text.

Step 17 – Detail to add Comments

Step 18 – Update through the REQU screen

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Creating a Requirement by Copying an Existing Requirement

Responsibility: Home

You can create a new requirement by copying an existing requirement.

The new requirement will have subrequirements specified exactly like the original requirement; however, it will not be linked to any programs.

Step 1 – Access the Academic Requirement Copy (ARQC) screen

Step 2 – At the Academic Requirements LookUp, enter the academic requirement you want to copy

- Enter the university identifier and ... for a listing

Step 3 - Enter the name you want associated with the new requirement in the New Requirement field

- Remember that requirements are smartcoded.

Step 4 – Update the ARQC screen

- You will automatically access the new record on the Academic Requirements (REQU) screen where you may then modify information for the new requirement.

Step 5 – After making modifications if necessary, update the REQU -> ARQC screens

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Defining Subrequirements

Responsibility: Home

Use the Subrequirement Specifications (SRSP) screen to define a subrequirement. Refer to “Understanding Subrequirements” at www.datatel.com for more information.

Step 1 - Access the requirement record on the Academic Requirements (REQU) screen.

Step 2 – Detail on the Subrequirements field to access the Subrequirement Specifications (SRSP) screen.

Step 3 - Enter the Subrequirement Name

- Every subrequirement must be identified by a smartcoded name. Subrequirement names will show on the audit – so the title should be user-friendly text.

Step 4 – Enter the Grade Scheme

- The grade scheme information is associated with the requirement to which this subrequirement belongs.

Step 5 – Enter the Minimum Grade and Other Grades

- Each field works similarly to the corresponding fields on the REQU screen.
 - Only needed if this is different than the minimum grade on the requirement

Step 6 – Enter the Minimum GPA

- Enter a minimum GPA IF one is needed for this subrequirement.
- The overall minimum GPA needed for this subrequirement.

Step 7 – Enter Activity Eligibility Rules

- Enter any rules needed to further limit the courses eligible to apply to this subrequirement. Eligibility rules entered at this level will compound (be added onto) any eligibility rules entered at the requirement and/or program levels.
- Naming convention is university -> module -> name

Step 8 – Enter Additional Evaluation Parameters

- If there is more than one group in this subrequirement, and you want to specify that courses may not be re-used among those groups, then detail to the Additional Evaluation Params (AEVP) screen. The Allow Course Reuse field defaults to "Yes." Set this field to No.
- This is not necessary if there is only one group attached to the subrequirement. If the same course can be used to satisfy more than one subrequirement, then this should be set to Yes.

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Step 9 – Enter a Specification

- This window requires the Degree Audit "TAKE" syntax.
- This is a collection of phrases which make up the detailed specification of this subrequirement's groups. The assembled text gets compiled into run-time tables.

Step 10 – Enter the print text as you want it to appear on the evaluation.

- You can enter text you want printed on the evaluation report.
- You can only specify this text at the subrequirement level.
- This means if you want text specific to a subrequirement to appear, you must type it here.
- The evaluation report will display this text prior to the entire subrequirement.

Note: The compilation of the syntax occurs on exit of the window. If error messages are detected, the UTEDIT screen appears in inquiry mode where you can read the description of the error. Upon exit from the UTEDIT screen, the specification window reappears with the cursor on the line in which the error occurred. This text is entered in flexible degree audit syntax. When you exit the screen, the text is broken up and stored in the ACAD.REQMT.BLOCKS file in its component pieces. When you reenter the screen, the text you typed no longer exists and is reconstructed by the system and displayed in a standard format. This means that if you type in your institution's specific syntax containing synonyms, and later return to the screen to modify it, it will not appear in the same text format; however, functionally it has not changed.

If you enter a course name in the specification text that is not unique, a message appears, then a course resolution screen will require you to choose the course that you intended to specify.

If the specification is being made for the first time and no printed text has been entered, upon exit from this window the system will duplicate the specified text in the printed text window. If printed text exists, the system will not rewrite it, even if changes are made to the specification text.

Step 11 – Update the SRSP -> REQU screens.

Changing a Subrequirement

- You can change the different components of the subrequirement including the subrequirement name, the minimum grade, and the specification.
 - However, you cannot change the grade scheme.
 - The subrequirement inherits the grade scheme from the requirement with which it is associated.
- Use the Subrequirement Specifications (SRSP) screen to change a subrequirement.
 - You can access the SRSP screen only by detailing from the Academic Requirements (REQU) screen.
- Be careful when changing a requirement that is already in use.

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- If a student has been granted an exception relevant to a particular group, then Colleague has stored that group's ID as part of the exception, and you must be careful not to change the group's ID, or else the student's exception will reference a group which no longer exists on the system, and Colleague will no longer grant the student that exception.
- For example, let's say the Specification group on the SRSP screen displays:
#GROUP.ID 6897
Take 3 courses; From Department MATH
and that student John Smith was granted an exception, allowing him to use course STAT*333 although it isn't a MATH department course. The system has now recorded that John has an exception pertaining to group 6897. If you now change the specification to
Take 4 courses; From department MATH
(that is, you change the number "3" to "4" and delete the GROUP.ID line), then John Smith may lose his exception. This loss of the exception occurs since every group must be assigned a group ID, and when you file this subrequirement, Colleague assigns this group a ID, although it will probably not be the ID it had before. When you retrieve the subrequirement on the SRSP screen, you could possibly see something like:
#GROUP.ID 8221
Take 4 courses; From Department MATH
When Colleague tries to evaluate John Smith, it sees that he has an exception on file, letting him apply STAT*333 to group ID 6897. However, at this point group 6897 is no longer part of his program; it has been replaced by group 8221.
- When changing a group, do not delete the GROUP.ID line unless the entire group is being deleted (in which case the exception probably becomes inapplicable).

Defining Academic Evaluation Defaults

Responsibility: DA Group

Use the Academic Evaluation Defaults (AEDF) screen to customize the behavior of the evaluation routine so that it better matches your institution's policies and report format preferences.

Refer to "Understanding Academic Evaluation Defaults" at www.datatel.com.

Step 1 – Access the Acad Evaluation Defaults (AEDF) screen

Step 2 – Store Evaluations to “No”

- When Smart Registration is used, this requires 'Yes'

Step 3 - Extra Course Handling to “I”

Step 4 - Use Low Grades to “No”

Step 5 - Wait until complete to Merge to “Yes”

Step 6 - Include to R – Registered/Preregistered

Step 7 - Cutoff Date – Use only if you are checking students for graduation.

Step 8 – Preferred E-mail Type to “PRI”

Step 9 – Report Format to “Single-column Report”

Step 10 - Related Courses Policy to “F”

Step 11 - Ignored statuses can be used as a limiting factor for what is displayed.

- Enter D, X & C

Step 12 – Update the AEDF screen

Web Parameters

Step 1 – Access the Web Acad Program Parameters (WAPP) screen

Step 2 – Include Code/Cutoff Date to “A”

Step 3 – Update the WAPP screen

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Setting the Print Location for Additional Requirements

Responsibility: University

- On an evaluation, the requirements print out (on screen or on hardcopy) in the same order you listed them on the Academic Program Requirements (APRS) screen.
- If you customize a program for a student by adding additional requirements, then the system will print those additional requirements at the end of the evaluation, unless you access the Addnl Reqmts Print Location (ADPL) screen and specify where those additional (custom) requirements should be inserted into the print sequence.

Step 1 - Access the Academic Program Requirements (APRS) screen for the program with additional requirements.

Step 2 – Detail to the Addnl Reqmts Print Location (ADPL) screen from the Addnl Reqmts Print Location field.

Step 3 – Define the following fields:

- Reqmt to Print CCDs After
- Reqmt to Print Majors After
- Reqmt to Print Minors After
- Reqmt to Print Specializations After

Enter the requirement with which the additional type requirements should be grouped on the evaluation report.

Step 4 – Update the ADPL -> APRS screens

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Defining Academic Sort Types

Responsibility: DA Group

Complete the steps listed below to define the academic evaluation sort types used by your institution:

Step 1 - Access the Academic Evaluation Sort Types (AEST) screen.

Step 2 - Enter the sort type name you want to use.

- If this is a new sort type, Colleague prompts you to (A)dd it.

Step 3 - Enter a rule used to identify the academic activity included in this sort group.

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

- You can access the Rules Definition (RLDE) screen from this field to create a new rule, or to modify an existing one.

Step 4 - If you want additional sorting within the sort group, enter one or more fields on which to sort the academic activity.

- The field you enter must be from the STUDENT.ACAD.CRED file.

Step 5 - Repeat steps 3 and 4 for any additional rules.

Step 6 - Enter any additional information about this sort type in the Comments field if desired.

- From this field, you can access your text editor to enter any comments.

Step 7 - Finish from the AEST screen.

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Defining Additional Valid Requirement Types

Responsibility: DA Group

Complete the steps listed below to define additional valid requirement types:

Step 1 - Determine the valid requirement types for each of the following:

- CCDs
- Majors
- Minors
- Specializations

Step 2 - Access the Additional Valid Requirement Types (AVRT) screen.

Step 3 - Enter the valid requirement types as determined in step 1.

- If you do not enter any requirement types, all requirement types are considered valid for CCDs, majors, minors, and specializations.

Step 4 - Finish from the AVRT screen.

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Defining Custom Paragraphs for the Evaluation Report

Responsibility: University

Use the DA Custom Paragraphs (DACP) screen to define custom paragraphs to print on student evaluations.

Refer to “Understanding the Evaluation Report Paragraphs” for guidance.

Note: Any rules that select students based on their active programs for **delivery** of custom paragraphs will not show up when students run a “what-if.” The alternative is building the message into a requirement that has a specification of 0 credits.

Step 1 – Access the DA Custom Paragraphs (DACP) screen

Step 2 – Define Custom Block Rules for the Beginning and End of Report Paragraph

- Naming convention is university or common -> module -> name
- Enter the name of a rule that determines which students get this paragraph on their report.
- You may also detail to create a new rule.
 - The rule entered or created here must be one with a primary view of the PERSON file (or any cofile of PERSON, such as the PERSON.ST file).
- For example, you may have defined a paragraph which you want only on the evaluations of students with senior class standing. If you create a rule called SENIORS that selects only those students with senior class standing and enter it here, you ensure that the associated paragraph appears only on seniors' evaluation reports.
- If this rule is evaluated as true for a student, the associated paragraph appears near the beginning of the report if entered in the Beginning of Report Paragraph.

Step 3 – Update the DACP screen

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Defining Synonyms

Responsibility: DA Group

Use the DA Synonyms (DASY) screen to define synonyms for the keywords provided by the Degree Audit module.

Step 1 – Access the Degree Audit Synonyms (DASY) screen

Step 2 – Define the synonym

- Enter the word you want to use in place of the keyword
 - The word you enter in the Synonym field will be recognized by the degree audit and course prerequisite compiler as a synonym of the word you enter in the keyword field adjacent to the synonym.

Step 3 – Define the keyword

- Enter the keyword for which you are defining a synonym

Step 4 – Update the DASY screen

South Dakota Colleague System Procedures

How to Build a Group

Responsibility: University

A Group consists of combinations of the following phrases:

Note: The phrases are shown in the form of examples. For clarity, some of the examples include words enclosed in angle brackets, such as “<of the following>”). These words are not part of the phrase and should not be entered unless your system administrator defined them as ignored words. Also, your system administrator may define synonyms for you to use (such as “CREDIT” for “HOUR” or “AREA” for “DEPARTMENT”).

TAKE Phrases

TAKE math*100, engl*110, bio*120;

TAKE math*100, engl*110 OR chem*222;

TAKE 2 <of the following> COURSES: math*100, engl*110, bio*120;

TAKE 5 HOURS;

TAKE 5 COURSES;

TAKE 5 math,bio,chem COURSES;

TAKE 5 300,400 LEVEL COURSES;

CUSTOM.MATCH “humanities”; (This phrase requires a programmer to write a custom program.)

Note: You must include 1 (and only 1) TAKE phrase in each group.

Selection Phrases

EXCEPT math*100, engl*110, bio*120;

FROM <the> DEPARTMENTS <of> math,bio,chem;

FROM <the> math,bio,chem DEPARTMENTS;

FROM math*100, engl*110, bio*120;

EXCEPT math,bio,chem;

FROM LEVELS 300,400;

EXCEPT LEVELS 300,400;

FROM RULE no.old.crses;

FROM SUBJECTS philosophy, religion, sociology;

EXCEPT SUBJECTS philosophy, religion, sociology;

MAXIMUM 5 HOURS PER COURSE;

MINIMUM 5 HOURS PER COURSE;

MINIMUM GRADE <of> c;

MINIMUM GRADE <of> c,au,p;

Note: The first grade is the minimum grade; the subsequent grades are the additional grades such as “Audit” and “Pass,” which are also permitted.

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Note: When you have a course that is 9 credits but the requirement says "maximum 6 credits per course" the system is not going to use that 9 credit course because it has no way of splitting the credits.

Note: When there are actually 2 separate courses - 1 for 6 credits and 1 for 3 credits, the system will allow both courses to be used. Unless the flag is set to "N" for reuse courses, the system will allow for both courses to satisfy the requirement.

Ceilings

MAXIMUM 5 100,200 LEVEL HOURS;
MAXIMUM 5 COURSES PER DEPARTMENT;
MAXIMUM 5 COURSES PER SUBJECT;
MAXIMUM 5 COURSES;
MAXIMUM 5 DEPARTMENTS;
MAXIMUM 5 SUBJECTS;
MAXIMUM 5 HOURS PER DEPARTMENT;
MAXIMUM 5 HOURS PER SUBJECT;
MAXIMUM 5 HOURS;

Additional Requirements

MIN GPA 2.5;
MINIMUM 5 COURSES PER DEPARTMENT;
MINIMUM 5 COURSES PER SUBJECT;
MINIMUM 5 COURSES;
MINIMUM 5 DEPARTMENTS;
MINIMUM 5 SUBJECTS;
MINIMUM 5 HOURS PER DEPARTMENT;
MINIMUM 5 HOURS PER SUBJECTS;
MINIMUM 5 HOURS;

Evaluation Directives

- These phrases instruct Colleague how to evaluate this particular group.
- The phrases in this group are rarely used, however, when used, they override the default values of the subrequirement.
- You should use these phrases only when you want Colleague to treat this particular group differently from other groups in this subrequirement.
- EXCLUDE maj;
 - Used to override the excluded types set at the requirement level.
 - This phrase is only used in DA specifications, never in course prerequisites.
- SORTBY bestgrade;
 - Instructs the system to resort the student's activity (eg courses) prior to evaluating this group.
 - The word following the keyword "SORTBY" must be a pre-existing ID on the DA.SORT.SPECS file (which is maintained in the Academic Evaluation Sort Types (AEST) process).

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- EXTRA_PARAM d;
 - Instructs Colleague how to handle extra courses. (See the system-wide parameter set on Academic Evaluation Defaults [AEDF] screen.)
- GRADE_PARAM y;
 - Instructs the system how to handle courses which failed the minimum grade specification.
 - Should they be included in the local GPA calculation?
 - The word following the keyword “GRADE_PARAM” must be either a Y or an N (see the system-wide parameter set on the AEDF screen.)
- IN.LIST.ORDER;
 - This one-word phrase can be used in a group that uses a “FROM COURSES . . .” phrase, to force the system into applying the courses in the order listed.

Other Phrases

- The phrases below apply only to Degree Audit, never to course prerequisite specification.
- GROUP.ID 2894;
 - This phrase should never be entered by you.
 - Colleague inserts this phrase into a DA specification once the specification has been successfully analyzed.
 - This phrase identifies the group with its system ID.
 - You should never modify this phrase.
 - You should also never delete a GROUP.ID phrase unless you are deleting the entire group to which it belongs.
- PRINT “French sequence”;
 - The PRINT phrase is used to specify descriptive text for this one group.
 - This text will appear on the DA evaluation.
 - The text must be in quotes and must end on the same line where it began.
 - However, more than one PRINT phrase may be used per group in order to produce a multiline description of the group.
 - The PRINT phrase is only needed if a subrequirement has more than one group, and you wish to provide each group with its own descriptive text.
 - If the subrequirement only has one group, then its description can be entered in the subrequirement print text window of the Subrequirement Specification (SRSP) screen.

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Degree Audit Workflows

Responsibility: University

You can create academic requirements using one of two workflows.

- First, you can create requirements before you create academic programs.
- If you use this workflow, you will have a selection of “building blocks” to use when you create academic programs.
- You also can create academic requirements as you create academic programs, accessing the key screens from the Academic Requirements (APRS) screen.
- In practice, you will probably end up combining the workflows. For example, after you create a core requirement for one program, it will exist for you to use in another academic program.

South Dakota Colleague System Procedures

Evaluating a Student's Program

Responsibility: University

Use the PGM Evaluation/Customization (PGEC) screen to process an evaluation of a student's program.

Step 1 – Access the PGM Evaluation/Customization (PGEC) screen

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

Step 3 – Detail on the Evaluate field to display the Evaluate Student Program (EVAL) screen

Step 4 – Define the following fields

Include Code/Cutoff Date

- Enter a code for courses to be included based on course completion date.
 - C = Complete: Only activity (courses/credits) that are already complete.
 - I = In Progress: Only activity that is either complete or already in progress.
 - A = All: All activity, including preregistered courses that have not yet started. This is the recommended default entry.
 - D = Date: Colleague prompts you for a cutoff date. Only activity that is, or is anticipated to be, complete by that date applies. You can access the "Cutoff Date" field only if the include code is set to "D." Use this only if you are checking students that are up for graduation.

Format

- 1 Single-column report
- 2 Double-column report

Related Courses Policy

- Enter a code for handling related courses
 - T - Together. Display the related courses together with the applied courses.
 - F - Footnote. Display the related courses at the bottom of the report in the form of a referenced footnote. This is the recommended default entry.
 - N - Not displayed. Do not display related courses at all.

Always Show Extra Courses

- Enter No to show extra coursework. Courses not applied to requirements will be listed under "other courses".

Ignored Statuses

- Enter one or more inactive credit statuses that you do not want to display on the academic evaluation.
- For example,

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- Canceled courses
- Withdrawn courses
- Dropped courses

Step 5 – Update the EVAL screen.

Step 6 - After the evaluation is displayed on the screen, you can scroll through it using the browser.

Step 7 - If you want to print the evaluation, select the “spool” option to enter the name of the printer you want to use.

Step 8 - Finish from the screens.

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Evaluating a Proposed Student Program

Responsibility: University

NOTE: When evaluating programs across universities this process will not work except for those students who enter as new students for Fall 2003.

Complete the steps listed below to propose a student program:

Step 1 - Review “Proposing a Student Program” at www.datatel.com.

Step 2 - Access the student on the Proposed Student Program (PSPR) screen.

Step 3 - Enter the proposed academic program.

- The administrative information for the program is displayed in the top section of the screen.
- A message displays if you select a program already assigned to the student, but Colleague allows you to continue to evaluate or customize the program.

Step 4 – Detail on the Evaluate field to evaluate a student’s academic records as they apply to the selected academic program.

- From this field, you access the Evaluation (EVAL) screen.
- Define the following fields
 - Include Code/Cutoff Date
 - Enter a code for courses to be included based on course completion date.
 - C = Complete: Only activity (courses/credits) that are already complete.
 - I = In Progress: Only activity that is either complete or already in progress.
 - A = All: All activity, including preregistered courses that have not yet started. This is the recommended default entry.
 - D = Date: Colleague prompts you for a cutoff date. Only activity that is, or is anticipated to be, complete by that date applies. You can access the "Cutoff Date" field only if the include code is set to "D." This is only used when checking students who are up for graduation.

Format

- 1 Single-column report
- 2 Double-column report

Related Courses Policy

- Enter a code for handling related courses
 - T - Together. Display the related courses together with the applied courses.
 - F - Footnote. Display the related courses at the bottom of the report in the form of a referenced footnote.
 - N - Not displayed. Do not display related courses at all.

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Always Show Extra Courses

- Enter No to show extra coursework. Courses not applied to requirements will be listed under "other courses".

Ignored Statuses

- Enter one or more inactive credit statuses that you do not want to display on the academic evaluation.
- For example,
 - Canceled courses
 - Withdrawn courses
 - Dropped courses

Step 5 - Use the Program Customization field to customize the selected academic program for the student.

- From this field, you access the PGM Evaluation/Customization (PGEC) screen.
- Refer to "Creating a Custom Program" and "Granting Exceptions" for additional information on customizing a student's program.

Step 6 - If you want to save this academic program and assign it to the student with a preliminary status, enter Y in the Save Current Program field.

- You cannot use this field to assign an academic program to an applicant.
- See Adding an Admissions Application for assigning this program to an applicant
- See Adding an Academic Program for assigning this program to a student

Step 7 - Use the Location field to associate the program with a specific location.

Step 8 - Finish from the PSPR screen.

South Dakota Colleague System Procedures

Running & Printing Individual Academic Evaluations

Responsibility: University

Note: In order to receive a degree, a student must meet the requirements listed in his/her “catalog of graduation”. All requirements for a specific program must be met under the same catalog. Students are considered to be in continuous enrollment for purposes of the catalog of graduation so long as any break in enrollment at any Regental university is for two or fewer consecutive semesters (excluding summer) and students maintain their degree seeking status at the same Regental university.

Any student, who elects to change their “catalog of graduation” from their initial catalog to a subsequent catalog, must inform the Office of the Registrar (Degree Auditor).

Deans, Department Heads, advisors, and any others who grant approved substitutions to a specific student’s degree requirements must report such substitutions to the Office of the Registrar (Degree Auditor).

Step 1 - Familiarize yourself with the way in which your institution has defined your academic programs and requirements.

Step 2 - Access the Evaluation Student Program (EVAL) screen for the student and academic program you want evaluated.

Step 3 - Enter any additional selection criteria in the following fields

Include Code/Cutoff Date

- Enter a code for courses to be included based on course completion date.
 - C = Complete: Only activity (courses/credits) that are already complete.
 - I = In Progress: Only activity that is either complete or already in progress.
 - A = All: All activity, including preregistered courses that have not yet started. This is the recommended default status.
 - D = Date: Colleague prompts you for a cutoff date. Only activity that is, or is anticipated to be, complete by that date applies. You can access the "Cutoff Date" field only if the include code is set to "D." Use this only if checking students that are up for graduation.

Format

- 1 Single-column report
- 2 Double-column report

Related Courses Policy

- Enter a code for handling related courses
 - T - Together. Display the related courses together with the applied courses.

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- F - Footnote. Display the related courses at the bottom of the report in the form of a referenced footnote. This is the recommended default status.
- N - Not displayed. Do not display related courses at all.

Always Show Extra Courses

- Enter No to show extra coursework. Courses not applied to requirements will be listed under "other courses"

Ignored Statuses

- Enter one or more inactive credit statuses that you do not want to display on the academic evaluation.
- For example,
 - Canceled courses
 - Withdrawn courses
 - Dropped courses

Step 4 – Update the EVAL screen.

Step 5 - After the evaluation is displayed on the screen, you can scroll through it using the browser.

Step 6 - If you want to print the evaluation, select the “spool” option to enter the name of the printer you want to use.

Step 7 - Finish from the screens.

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Adding a Standard Requirement

Responsibility: Home

- The second window from the top of the PGEC screen displays characteristics of the program that you cannot modify in the PGEC screen.
- The program attributes listed in this window (such as majors, minors) are associated to the student by virtue of being assigned to the program.
- The student inherits the programs attributes as defined on the Academic Programs (PROG) screen.
- You may not disassociate these attributes from the student without assigning the student to another program.
- You may, however, add components (for example, add an additional major) by entering the additional components in the Addnl CCDs, Addnl Majors, Addnl Minors, and Addnl Specs fields of the PGEC screen.
- To add a component, you *must* enter the name of the component in the applicable field *and* then link a requirement to that component in either the Standard Reqmt field or the Cust field.
 - For example, if you want to add a certified public accountants (CPA) examination to a student's program, you would enter the code for the public accountants certification in the Addnl CCDs field and enter the CCD requirement in the Addnl CCDs Standard Reqmt field.
 - The Cust field defaults to No when you enter a standard requirement.

Note: If you do not link the requirement, the student is *not* required to do anything to complete the additional requirement. For example, if you added Math to the Addnl Majors field but did not associate that additional major with a requirement, the student *is* considered a math major but will be able to graduate in the math major *without* needing to take any extra math courses because you never indicated the work he needs to complete.

Note: In order to receive a degree, a student must meet the requirements listed in his/her “catalog of graduation”. All requirements for a specific program must be met under the same catalog. Students are considered to be in continuous enrollment for purposes of the catalog of graduation so long as any break in enrollment at any Regental university is for two or fewer consecutive semesters (excluding summer) and students maintain their degree seeking status at the same Regental university.

Any student, who elects to change their “catalog of graduation” from their initial catalog to a subsequent catalog, must inform the Office of the Registrar (Degree Auditor).

Deans, Department Heads, advisors, and any others who grant approved substitutions to a specific student's degree requirements must report such substitutions to the Office of the Registrar (Degree Auditor).

Step 1 – Access the PGM Evaluation/Customization (PGEC) screen

10/30/08 – last update

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Revisions approved through the Module → Module Coord Committee → UDA/SDA

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Step 2 – Enter the Customization

- Enter the Addnl CCDs, Majors, Minors or Specs

Step 3 – In the Standard Reqmt field, at the Academic Requirement LookUp, enter the name of the requirement for this customization

- Enter the university identifier and ... for a listing of requirements
- If the requirement does not exist, enter the name of the requirement, a Record not found, Enter (A) to add prompt is displayed
 - Enter A to add the smart coded requirement
 - The Academic Requirements (REQU) screen is displayed
 - See Defining a Requirement to define the fields on REQU
- To specify a custom component (requirement), detail on the component's Cust field to access the Custom Academic Requirements (QCRS) screen.
 - You can specify the custom component on the QCRS screen by defining the following
 - Title** – Enter the title of the requirement
 - Type** – Enter the type of the requirement; F1 twice for the table
 - Specification** - This window requires the Degree Audit "TAKE" syntax. This is a collection of phrases which make up the detailed specification of this subrequirement's groups. The assembled text gets compiled into run-time tables. See the Degree Audit Learning Guide for more information about DA Syntax.
 - **Print Text** - You can enter text you want printed on the evaluation report.
 - When you finish from the QCRS screen, the component's Cust field displays a "Yes" (on the PGEC screen).

Step 4 – Detail on Review Student Program Reqmts to view the evaluation

- Make any necessary changes

Step 5 – Update the PGEC screen

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Adding a Custom Requirement

Responsibility: Home

If you want to create a custom requirement for the student's program, you can access the custom Academic Requirement (QCRS) screen to add a custom requirement by detailing from the Cust field on the PGM Evaluation/Customization (PGEC) screen. For example, you could add the Business Administration minor to a student's program and create specifications for this student only. To create a custom requirement, detail from the Cust field to the QCRS screen. You must enter the specifications in Degree Audit syntax (see "Degree Audit Syntax", using either the keyword provided or the synonyms your institution defined. Use the Print Text field to document and format how the specification prints out on the evaluation.

Adding a Custom Requirement to a Student's Program

Use the Evaluation/Customization (PGEC) screen to add a custom requirement to a student's program. Refer to "Adding a Custom Requirement" and on-line help for information about the fields on the PGEC screen.

To add a custom requirement to a student's program, you must:

Step 1 - Review "Adding a Custom Requirement."

Step 2 - Access the student's record on the PGM Evaluation/Customization (PGEC) screen.

Step 3 - Enter the additional requirement.

- If you are adding a custom major, enter the additional requirement in the Addnl Majors field.

Step 4 - Access the Custom Academic Requirement (QCRS) screen.

- You can access the QCRS screen by detailing from the Cust field.

Step 5 - Enter the requirement specifications.

- Enter the title of the custom requirement
 - This will print on the evaluation.
- Enter the requirement type code
 - The requirement type code identifies the requirement's evaluation priority.
 - For example, MAJ, SPC, GEN, etc
 - F1 twice for a listing
- Enter the requirement specification
 - A specification consists of one or more groups. Each group is a collection of one or more of the phrases listed below. If more than one group is specified, then each group must be prefixed with "# " to mark the start of a new group. If more than one group is specified, and the student can select

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from among them, then the entire specification must be preceded with a "TAKE x GROUPS" phrase.

- In general then, a specification will take one of the following 3 forms:

- 1) Multiple groups, from which 1 or more must be selected

Take x groups

...group...

...group...

...

- 2) Multiple groups, all of which are required

...group...

...group...

...

- 3) A single group

...group...

- Enter the requirement as you want it to print

Step 6 - Save the record from the QCRS screen.

Step 7 - If you want to add other custom requirements, repeat this procedure beginning with step 3.

Step 8 - Save the record from the PGEC screen.

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Granting Program-Level Exceptions

Responsibility: Home

Use the Program-Level Exceptions (PGEX) screen to grant program-level exceptions. You can access the PGEX screen by detailing from the program listing in the requirements group of the Exceptions and Overrides (EXOV) screen. Refer to “Program-Level Exceptions” and on-line help for information about the fields on the PGEX screen.

To grant a program-level exception, you must:

Step 1 - Review the “Program-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s program record on the Exceptions and Overrides (EXOV) screen.

- You can access the EXOV screen from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) screen.

Step 3 - Access the program listing on the EXOV screen.

Step 4 - Detail to the Program-Level Exceptions (PGEX) screen

- The PGEX screen is available only as a detail from the EXOV screen.

Step 5 - Access the program requirement (i.e., institutional GPA).

Step 6 - Detail to the requirement’s exception or waiver screen.

- Each of the program level requirements has both an exception and waiver screen.
- You can access either screen by detailing from the program requirement on the PGEX screen.
 - Overall/Institutional Credits
 - EXCR Change Required Credits
 - EXWV Waive
 - Overall/Institutional GPA
 - EXGP Change Required GPA
 - EXWV Waive

Step 7 - Complete the exception or waiver screen.

- If you are granting an exception, you must enter the new value and the exception print text (in the Exception Print Text field).
 - The text you enter in this field will print on the evaluation.

Note: If an exception is showing on an EVAL, but not on the PGEC, there may be too many CCD requirements on PGEC--even if some have been ended. To solve the problem, remove the CCD requirements for the ended requirements. Then, the new added requirement shows on EXOV. If you want to keep the ended CCDS on that

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program for that student, make the changes on EXOV for the new CCD, then add the ended CCDs back on PGEC with the start and end dates. If history is not needed, you don't need to add them back on.

Step 8 - Save from the exception or waiver screen.

Step 9 - Save from the PGEX screen.

Step 10 - Save from the EXOV screen.

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Granting an Exception to the Number of Subrequirements

Responsibility: Home

To grant an exception to the number of subrequirements you must:

Step 1 - Review the “Requirement-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s record on the Exceptions and Overrides (EXOV) screen.

Step 3 - Highlight the requirement item listed in the student’s program and detail to the Requirement-level Exceptions (RQEX) screen.

Step 4 - Access the Number of Subrqmts Needed field and detail to the Change Required Number (EXCT) screen.

Step 5 - Complete the screen.

- You must enter a value in the Replacement Count field.
- You must also enter text in the Exception Print Text field to complete the waiver.
- The text you enter will print out on the evaluations run against this program.

Step 6 - Save the record from the EXCT screen.

Step 7 - Save the record from the RQEX screen.

Step 8 - Save the record from the EXOV screen.

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Granting Exceptions to the Requirement GPA

Responsibility: Home

To grant an exception to the requirement GPA, you must:

Step 1 - Review the “Requirements-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s record on the Exceptions and Overrides (EXOV) screen.

- You can access the EXOV screen from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) screen.

Step 3 - Highlight the requirement item listed in the student’s program and detail to the Requirement-Level Exceptions (RQEX) screen.

Step 4 - Access the Requirement GPA field and detail to either the Change Required GPA (EXGP) screen, or the Waive (EXWV) screen.

- Use the EXGP screen to change the required GPA.
- Use the EXWV to waive the required GPA.

Step 5 - Complete the screen.

- If you want to change the required GPA, you must enter a new GPA in the Replacement GPA field on EXGP
 - You must also enter text in the Exception Print Text field.
 - The text you enter here will print on evaluations run against this program.
- If you want to waive the GPA, you must enter text in the Exception Print Text field on the EXWV screen to complete the waiver.
 - The text you enter will print out on the evaluations run against this program.

Step 6 - Save the record.

- You must save from the RQEX and EXOV screens to save your work.
- If you cancel from any of these screens, the work will not be recorded.

South Dakota Colleague System Procedures

Replacing the Entire Requirement

Responsibility: Home

To replace the entire requirement you must:

Step 1 - Review the “Requirement-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s record on the Exceptions and Overrides (EXOV) screen.

Step 3 - Highlight the requirement item listed in the student’s program and detail to the Requirement-level Exceptions (RQEX) screen.

Step 4 - Access the Replaced field and detail to the Replace Entire Block (EXBR) screen.

Step 5 - Complete the screen.

- You can view the entire requirement by detailing from the Original Requirement field.
- You must enter the course(s) replacing the requirement in the Course field.
- You must also enter text in the Exception Print Text field to complete the waiver.
 - The text you enter will print out on the evaluations run against this program.

Step 6 - Save the record.

- You must save from the RQEX and EXOV screens to save your work.

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Waiving a Requirement

Responsibility: Home

To waive a requirement you must:

Step 1 - Review the “Requirement-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s record on the Exceptions and Overrides (EXOV) screen.

- You can access the EXOV screen from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) screen.

Step 3 - Highlight the requirement item listed in the student’s program and detail to the Requirement-Level Exceptions (RQEX) screen.

Step 4 - Access the Waived field and detail to the Waive (EXWV) screen.

- You can view the entire requirement by detailing from the Original Requirement field.
- You must enter text in the Exception Print Text field to complete the waiver.
 - The text you enter will print out on the evaluations run against this program.

Step 5 - Save from the EXWV screen.

Step 6 - Save from the RQEX screen.

Step 7 - Save the record from the EXOV screen.

South Dakota Colleague System Procedures

Removing Exceptions

Responsibility: Home

You can remove exceptions from a student's academic program by detailing to the appropriate screen and using the "record delete" function.

Step 1 - Access the student's program record on the Exceptions and Overrides (EXOV) screen.

- You can access the EXOV screen from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) screen.

Step 2 – Detail on the Requirement you will be removing to access the appropriate screen

- For example, PROG, REQMT, or SUBREQMT

Step 3 – If you detail on PROG, the Program-Level Exceptions (PGEX) screen displays

- Detail on the Overall/Institutional Credits to access the Change Required Credits (EXCR) or Waive (EXWV) screens to remove the program level exception
- Detail on the Overall/Institutional GPA to access the Change Required GPA (EXGP) or Waive (EXWV) screens to remove the program level exception

Step 4 – If you detail on REQMT, the Requirement-Level Exceptions (RQEX) screen displays

- Detail on the Requirement GPA to access the Change Required GPA (EXGP) or Waive (EXWV) screen to remove the requirement level exception
- Detail on the Number Subreqmts Needed to access the Change Required Number (EXCT) screen to remove the requirement level exception
- Detail on Waived to access the Waive (EXWV) screen to remove the requirement level exception
- Detail on Replaced to access the Replace Entire Block (EXBR) screen to remove the requirement level exception

Step 5 - If you detail on SUBREQMT, a resolution screen displays with either Subreqmt-Level Exceptions (SREX) or Subrequirement Overrides (SROV)

- Select SREX to remove the subrequirement level exception
- Select SROV to remove the subrequirement level override

Step 6 – Save your work.

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Granting Exceptions to a Group within a Subrequirement

Responsibility: Home

Use the Subrequirement-Level Exceptions (**SREX**) screen to grant exceptions to a group within a subrequirement. You can access the **SREX** screen by detailing from the exceptions and Overrides (**EXOV**) screen.

To grant exceptions to a group you must:

Step 1 - Review the “Granting Exceptions to a Group within a Subrequirement” section at www.datatel.com.

Step 2 – Access the Exceptions and Overrides (EXOV) screen

Step 3 – At the person lookup prompt, enter the ID or full name of the person

Step 4 - Detail on the subrequirement you need to make an exception to.

- Select the Subrequirement-Level Exceptions (SREX) screen

Step 4 - Access the group and detail to the exceptions screen.

- You can replace the entire group by accessing the Replace Entire Block (EXBR) screen.
 - Enter the block of courses to replace this subrequirement
 - Enter a Min Grade and GPA
 - Enter an Exception Print Text to print on the evaluation
- You can allow additional courses to be considered for the group by accessing the Allow Additional Courses (EXAC) screen.
 - Detail on the Group
- You can waive the group by accessing the Waive (EXWV) screen.
 - Enter an Exception Print Text to print on the evaluation

Step 5 - Save the record.

South Dakota Colleague System Procedures

Granting Exceptions to Items within a Group (Credit Count or Courses)

Responsibility: Home

To grant exceptions to items within a group you must:

Step 1 - Review the “Granting Exceptions to Items within a Group” section of this chapter.

Step 2 – Access the Exceptions and Overrides (EXOV) screen

Step 3 – At the person lookup prompt, enter the ID or full name of the person

Step 4 - Access the PROG item (credit count or course) and detail to the Program-Level Exceptions (PGEX) screen.

- If you are granting an exception to a credit count, access the count line and detail to the Change Required Credits (EXCR) screen.
 - Enter the Replacement Credits
 - Enter an Exception Print Text to print on the evaluation
- If you are waiving the credit count, access the Waive (EXWV) screen.
 - Enter an Exception Print Text to print on the evaluation
- If you are granting an exception to a course, access the course listing and detail to the Course Waivers and Subst (EXCL) screen.
 - Detail on the actual courses in the group
- You must enter text in the Print Text field.
 - The text you enter will print out on the evaluations and reports run against this program.

Step 5 - Save the record.

South Dakota Colleague System Procedures

Granting Exceptions to a Subrequirement GPA or Credit Count

Responsibility: Home

Use the Subreqmt-Level Exceptions (SREX) screen to grant an exception to a subrequirement GPA or credit count. You can access the SREX screen by detailing from the Exceptions and Overrides (EXOV) screen.

To grant exceptions to a subrequirement GPA or credit count you must:

Step 1 - Review the “Granting Exceptions to Items within a Subrequirement” at www.datatel.com.

Step 2 – Access the Exceptions and Overrides (EXOV) screen

Step 3 – At the person lookup prompt, enter the ID or full name of the person

- At the person resolution screen, select the person
- If the person has more than one program, select the appropriate program

Step 4 - Access the requirement item and detail to the Requirement-Level Exceptions (RQEX) screen.

- If granting an exception to the requirement GPA, detail on the Requirement GPA field to access the Change Required GPA (EXGP) screen.
 - Enter the Replacement GPA
 - Enter the Exception Print Text to print on the evaluation
- If granting an exception to the subrequirement count, detail on the Number Subreqmts Needed to access the Change Required Number (EXCT) screen.
 - Enter the Replacement Count
 - Enter the Exception Print Text to print on the evaluation
- If granting an exception to the subrequirement credit, access the Change Required Credit (EXCR) screen.
 - Detail on the credit group
- If you want to waive the requirement item, detail on the Waive field to access the Waiver (EXWV) screen.
 - Enter the Exception Print Text to print on the evaluation
 - If you want to waive a subrequirement item, detail on the subrequirement to access the Subreqmt-Level Exceptions (SRES) screen
 - Detail on the subrequirement to access the Waive (EXWV) screen
 - Enter an Exception Print Text to print on the evaluation

Step 5 - Save the record.

- You must save from the exceptions screen and the SREX screen to save your work.

South Dakota Colleague System Procedures

Granting Exceptions to the Entire Subrequirement

Responsibility: Home

Use the Subrqmt-Level Exception (SREX) screen to grant exceptions to a subrequirement. You can access the SREX screen by detailing from the Exceptions and Overrides (EXOV) screen. You can either replace or waive the entire subrequirement. Access the subrequirement title line and detail to either the Replace Entire Block (EXBR) screen or the Waive (EXWV) screen.

To grant exceptions to the entire subrequirement you must:

Step 1 - Review the “Subrequirement-Level Exceptions” at www.datatel.com.

Step 2 - Access the student’s record on the Exceptions and Overrides (EXOV) screen

- You can access the EXOV screen from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) screen.

Step 3 - Highlight the subrequirement item listed in the student’s program and detail to the Subrqmt-Level Exception (SREX) screen.

Step 4 - Access the subrequirement title line and detail to either the Replace Entire Block (EXBR) screen or the Waive (EXWV) screen.

Step 5 - Complete the screen.

- If you accessed the EXBR screen, you must enter at least one course as the replacement course in the Courses field.
- You must enter text in the Exception Print Text field on either the EXBR screen or the EXWV screen to complete the waiver.
 - The text you enter will print out on evaluations run against the program.

Step 6 - Save the record.

- You must save from the SREX and EXOV screens to save the record.

South Dakota Colleague System Procedures

Overriding the Evaluator's Application of Academic Credit Responsibility: Home

Use the Evaluation Override (EVOV) screen to override the evaluator's application of academic credit toward a requirement. You can access the EVOV screen from the Subrequirement Overrides (SROV) screen which is accessible from the Exceptions and Overrides (EXOV) screen. See "Overriding Evaluator Decisions" at www.datatel.com.

Complete the following steps to override the evaluator's application of academic credit.

Step 1 - Access the individual's program record on the Exceptions and Overrides (EXOV) screen.

- You can access the screen from the menu or from the PGM Evaluation/Customizations (PGEC) screen.

Step 2 - Access the subrequirement whose application you want to override and detail to the Subrequirement Override (SROV) screen.

Step 3 - Access the subrequirement component (group) you want to override and detail to the Evaluation Override (EVOV) screen.

- You must enter either a course to apply to the subrequirement or a course you do not want applied to the subrequirement.
- You must select the course from the student's STUDENT.ACAD.CRED record by entering ... and selecting that course on the resolution screen.

Step 4 - Finish from each screen.

South Dakota Colleague System Procedures

Reviewing Student Program Reqmts

Responsibility: Home

You can view the student's entire program including exceptions and waivers by detailing from the Review Student Program Reqmts field.

For more information about viewing a student's program requirements, see "Evaluating a Student's Academic Program".

Step 1 – Access the student's program on the PGM Evaluation/Customization (PGEC) screen

Step 2 – Detail on the Review Student Program Reqmts field

Step 3 – Enter S to send it to the printer or page down to view the full evaluation.

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Appendix

South Dakota Colleague System Procedures

Minimum Grade vs. Other Grades in Degree Audit

In Degree Audit, you are able to specify both “Minimum Grade” and “Other Grades Allowed” at every level of a program. It is important to understand the difference in the way these two fields operate.

Minimum Grade

When you populate “Minimum Grade,” the system uses the grade scheme you have specified to determine a minimum grade **value**. For instance, if you specify a minimum grade of D in the UG grade scheme, and the value of D in that scheme is 1.0, the system identifies 1.0 as the minimum grade value. It will then look similarly at the value of grades in **any** grade scheme and identify whether those grades meet the minimum grade value of 1.0.

Minimum grade thus looks at grades from all grade schemes that might be referenced in academic records selected by the transcript grouping used for Degree Audit. As long as a grade has a grade value in its grade scheme that meets the minimum, it will be considered.

Other Grades Allowed

“Other Grades Allowed” gives you an opportunity to reference grades that will not meet the grade value criteria – generally because they have a value of 0. This often includes GPA-neutral grades such as P, CR, S, etc. The system used the **record ID** of these grades (a system-generated number) for identification purposes. For instance, if you specify that an “Other Grade Allowed” is P, and the grade scheme you are referencing is UG, the system identifies that the record ID of the grade of P in the grade scheme of UG is, for example, #12345. It then is looking for any grades in the selected records that have a grade ID of #12345.

You might have other records that have a grade of P, but, if they are grades in another grade scheme, they will have a different grade ID and will thus not be considered.

Other grades, then, does NOT look at grades from all grade schemes. Since you can only reference one grade scheme in Degree Audit, you will need to look at other ways to tell the system that a grade of P in another grade scheme (which will have a different record ID) is also allowed.

Multiple Grade Schemes and Degree Audit

When you are able to specify minimum grade solely on the basis of grade value, Degree Audit looks across multiple grade schemes with no problem. The only potential problem might be an instance when you have grade schemes with very different grade values. This could create a situation where the minimum grade value allowed is different in different grade schemes. Fortunately, this rarely happens.

Other grades allowed, however, can be a problem with multiple grade schemes. If you want the grade of P, for example, to be recognized from more than one grade scheme,

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“Other Grades Allowed” will not meet your needs. The solution in such cases is to give the grade of P a value that will allow it to be selected under Minimum Grade criteria. Since grade code flags allow you to specify whether a grade should be calculated in GPA, the grade of P can be given a value that will meet the minimum grade criteria. As long as the grade code flag to calculate the grade into the GPA is set to No, the grade remains GPA-neutral. One potential problem with this solution is the fact that, when such grades have a value that meets the minimum, there is no way to **exclude** them from consideration. For instance, if you set the value of P as 2.0 so P’s from any grade scheme will be recognized in programs, but you **do not** want P to be recognized toward program major requirements, this may pose a problem. Another potential problem occurs in the repeat/replace process if you use the repeat policy of BEST. Often, simply adjusting the value of the grade and/or the repeat grade value can solve this problem – but it must be carefully considered.

If you prefer to leave the grade value of “Other Grades” at 0, but you want the system to recognize them, the other potential solution is moving all “Other Grades” into only one grade scheme. However, you must then run a utility to change all occurrences of that grade in the STUDENT.ACAD.CRED file to the new common grade scheme. Please consult with Datatel before pursuing that option.

Summary

If all of your STUDENT.ACAD.CRED records reference only one grade scheme, grade references in Degree Audit should pose no problem at all for you.

If records in STUDENT.ACAD.CRED reference more than one grade scheme, you will need to carefully consider the ramifications of “Other Grades” such as P, CR, S, etc. in Degree Audit. If you decide to give “Other Grades” a value so they can be selected under “Minimum Grade” criteria, you will want to carefully consider the ramifications of that decision on your repeat/replace policy if you use the BEST policy.

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