Student Information Systems

Reporting Module

Procedure Manual

Table of Contents

Revisions in this update: 3
Enrollment Extract..... 4
  Census Day Extract 4
  MidTerm Extract 7
  End of Term Extract..... 7
  Changing Data after an Enrollment Extract Freeze 8
Procedure for generating the 70-line report by residency, classification, and gender 10
  Specs of the 70-line report 10
Defining the IPEDS Institutional Characteristics Parameters 12
Generating the IPEDS Institutional Characteristics Reports 13
  Procedure for Producing Survey 2 13
Defining IPEDS Fall Enrollment Parameters..... 15
Generating the IPEDS Fall Enrollment Survey 17
Generating the IPEDS Completions Report 22
Defining the IPEDS Graduation Rate Survey Report Parameters 23
Building the IPEDS Graduation Rate Survey Workfile 25
Generating the IPEDS Graduation Rate Survey Report..... 26
Yearly Building Replacement Factor Update..... 27
Fact Book Report(s)..... 28
Facilities Reports..... 29
  UniQuery Basics..... 41
Opportunity Scholar Reporting 43
  University Processing 43
  RIS Processing 46
  SDOS Admin System Reporting 46
Athletic Reporting 50
  Adding a Campus Organization 50
  Adding an Athlete Membership 51
  Ending an Athlete Membership 52
Delaware Cost Study 55
  Colleague Information:..... 55
  PayPerS Information 55
Healthcare Program Reporting..... 63
National Student Loan Clearinghouse Setup..... 65
Defining Your NSC Reporting Parameters..... 66
Translating Hiatus Codes on NSC..... 69
Translating Withdrawal Reasons on NSC..... 70
Extracting Student Information for NSC Reporting 71
  Graduate Processing 71
  Enrollment Reporting..... 72
Correcting NSC Extracted Information 76
Generating the NSC Analytical Report..... 77
Verifying NSC Extracted Information..... 79
Creating a NSC Hold File for Submission 81
Reporting to the National Student Clearinghouse..... 83
Purging NSC Information..... 85
Using National Degree Verification Service..... 86

Revisions in this update:

12/21 - Updated labs pulled by Facilities reporting

Enrollment Extract

Revised
10/24/06

Responsibility: University/RIS
Timeframe:

XH.ENROLLMENT determines level as follows:

- If a student has degree-seeking programs at two levels, they are assigned the highest level.
- If a student has a special program at one level and a degree-seeking program at another level, they are given the level of the degree-seeking program, unless the special program is at the LAW level. Then they are assigned the LAW level.
- If a student has special programs at two levels, they are assigned the highest level.

Criteria:
If a student is not degree-seeking at a university, but is enrolled there, they are counted as a special student.

Effective Spring 2005, a new report to the enrollment extract (ENRLTABL) for the following was added.

- Graduate degree seeking students taking only undergraduate level courses
  - Students on this list should have a level of UG. Level GR indicates that undergraduate courses were added to GR level which needs to be corrected.

- Undergraduate degree seeking students taking only graduate level courses
  - Students on this list should have a level of GR. Level UG indicates that graduate courses were added to UG level and need to be corrected.

<u>Census Day Extract</u>
The reports that are generated from the Fall Census Day Extract include:

- Total/State Enrollment tables
  - Verify/review residency, class, and section billing information (to pull state support students)
  - This report shows headcount and FTE of all students and state support students in the extract by residency status, gender, and class.
- Enrollment by State/Age/Ethnicity
  - Verify residence state
  - This report shows the number of all students by residence state, age, and ethnicity
- Enrollment by County
  - Verify SD residency, SD high school & county
  - This report shows the number of SD residents who graduated from SD high school by their HS county
- Enrollment Book, 30 Total headcount/FTE tables
  - Verify level, class, residency status, enrollment status

  - The 30 tables come from 64-line report which checks level, class, residency status, gender, hours enrolled, and enrollment status.
- Enrollment reporting in general
  - Verify classification; verify enrollment status; verify admit status; verify HS student grad date & HS students taking courses; verify student types/residency; verify Academic vs Course level; verify WD students; verify program start dates/missing programs; verify WUE information (WUE address)
- Verify distance education sections
  - All DDN sections will have a 020 or 025, not 001
- Verify SDOS requirements
  - Be graduated from high school with a **cumulative average grade of "B" (3.0 on a 4.0 scale)**, or greater, for all work attempted;
  - Be a resident of South Dakota at the time of graduation from high school;
  - Take the test administered by the American College Testing Program (ACT) or the Scholastic Assessment Test (SAT) before being graduated from high school;
  - Receive a composite score on the ACT of at least 24 or a combined verbal and mathematics score on the SAT of at least 1070**;**
  - At least 37 HS units recorded
- Fact Book, Total/State Support/Self Support headcount/FTE by University
  - Verify class, state/self support schedule type on sections
  - This report uses class, state/self support flag, and credit hours enrolled in state/self support courses.
- Fact Book, New Registrants Report
  - Verify level, class and enrollment status
  - This report includes students with level UG, class not SP or PH, and enrollment statuses F/T/R.
- Fact Book, High School Headcount
  - Verify enrollment status
  - This report includes students with enrollment status H.
- SDPURC enrollment report
  - This report looks at DOB, ethnicity, gender, marital status, enrolled sections, HS grad date, and program. From course extract it looks at section level, section id, subject, course number, section number, section location (Topic code), section status, CIP, self support/state support, & section enrollment
- WUE enrollment data file for WICHE
  - Verify/review student types, residency, & section billing
  - Verify WUE students have WUE state
  - This report checks special rate code (STU.TYPES) & enrollment in state support classes
- Proficiency Testers List
  - Verify/review test scores, addresses and programs
  - This report checks for previous test scores, checks ACAD.CREDENTIALS to see if the student has Bachelors or Masters

degree. Uses Home, Local, and Preferred address. Uses academic program from XH.ENRL.PROGRAM to determine if the student is eligible.

- Section Size Report
    - Verify enrollment in active sections with instructional methods of D-discussion/recitation, E-seminar, H-ensemble, L-laboratory, K-alternate laboratory, P-physical education activity, and R-lecture and enrollment less than 10 for UG; 7 for GR; record justifications for these sections
    - The report looks for all three academic terms – Summer 2005, Fall 2005 & Spring 2006.
    - See this URL for guidelines – http://www.sdbor.edu/administration/academics/aac/documents/Section_Size_Guidelines_Rev_2-19-02.pdf
- Five data files for STEP
    - Verify/review course sections, faculty assignments, etc.
    - These are 5 data files from the frozen extract each term (SU end of term, FA/SP census) for each univ including section data, student data, student/section data, and faculty/section data. The files also contain faculty data from live.
- Annual Budget Adjustment
    - Verify/review course levels
    - This is part of the formula report. It breaks down credit hours to lower level (course # < 300), upper level (course # < 500), law, thesis, dissertation, and other graduate.
- Delaware Cost Study
    - Verify active sections have a faculty assignment
    - Verify faculty department is accurate
- President Management Report
    - It contains many tables and is revised often. Last one was for President Sch in June. Data elements used covered degree, major, level, residency status, hours enrolled, class, gender, ethnicity, age, alien flag, immigration status, composite ACT, and student types.
- Performance Funding Report
    - There are 2 parts, system measure (retention) and university measures for SDSU and USD.
        - Retention uses - degree seeking undergraduates and hours enrolled from previous fall, degrees conferred data from December to August, deceased flag, military activation or armed services flag.
        - University measures
            - SDSU measure - Degree seeking UG students who enrolled 12 or more credit hours and registered in one of the following courses:
                - ABS 381, ABS 382, AM 480, EURS 311, FREN 385, FREN 480, FREN 498, ID 480, MFL 196, MFL 396, NFS 480, SOC 286, SOC 291, AIS

286, ABS 482, GS 240, GS 340, GS 440 or courses with instructional method of C, G, J, or S

- USD measure - Degree seeking UG students with 12 or more credit hours and degree seeking GR students who register in one of the following courses:
  - courses with instructional method J, T, or U instructional method of A, subject is ART, ARTD, MUAP, MUEN, MUS, or THEA, and course number >= 400 subject IDEA and course number >= 400 course number > 100 and ends with 98

MidTerm Extract

The reports that are generated from the Fall MidTerm Extract include:

- Tuition Reduction Report
  - Verify/review student types, residency, & section billing
  - This report checks special rate code (STU.TYPES) & enrollment in state support classes
- National Guard tuition reimbursement
  - Verify/review student types of NG…
  - This report excludes state-support undergraduate courses taken by resident students
- Fact Book Facilities Mgmt
  - Verify course sections for specific instructional methods have days, times, buildings & rooms
  - Verify/review Facilities Utilization reports

End of Term Extract

The reports that are generated from the Spring End of Term Extract include:

- Distance Education Reports
  - Verify delivery method (local govt code), topic code, bldg/room & course type
  - The report looks at sections with the first value of sec.local.govt.codes (field 15 on SECT) that is 002, 006, 007, 013, 015, 018, 019, 020, 025, or 026.
- Minimum Progression Standards Report
  - Verify all UG for F04, S05 & Su05 have minimum progression calculated and/or calculated accurately
- Enrollment by Major Report
  - Verify degrees/majors are approved degrees/majors
  - For example, an additional major should not be listed on STPA if the Degree information is not the same as the major/program listed on SACP. A new program should be added for this student instead so the correct degree information will be pulled from the PROG screen for that major.
- Teacher Ed Enrollment Report

- Verify all Teacher Education students have an E program status
- Self-support hours for EUC bill
  - Verify course level, funding & remedial sections
  - The report looks at self-support hours by course level, externally supported/remedial/others, and 3 locations.
    - Sections with F at the 4th char of schedule type are externally supported.
    - Course numbers that start with zero are remedial.
    - The 3 locations include topic codes SF/USDSD, EW, and on campus (SHMC for BHSU, MDMC for DSU, ABMC for NSU, RCMC for SDMT, BRMC for SDSU, and VMMC for USD).
- SDPURC enrollment report
  - This report looks at DOB, ethnicity, gender, marital status, enrolled sections, HS grad date, and program. From course extract it looks at section level, section id, subject, course number, section number, section location (Topic code), section status, CIP, self support/state support, & section enrollment
- Enrollment reporting in general
  - Verify classification; verify enrollment status; verify admit status; verify HS student grad date & HS students taking courses; verify student types/residency; verify Academic vs Course level; verify WD students; verify program start dates/missing programs; verify WUE information (WUE address)
  - Verify SDOS requirements
    - Be graduated from high school with a **cumulative average grade of "B" (3.0 on a 4.0 scale)**, or greater, for all work attempted;
    - Be a resident of South Dakota at the time of graduation from high school;
    - Take the test administered by the American College Testing Program (ACT) or the Scholastic Assessment Test (SAT) before being graduated from high school;
    - Receive a composite score on the **ACT of at least 24 or a combined verbal and mathematics score on the SAT of at least 1070**;
    - At least 37 HS units recorded

Changing Data after an Enrollment Extract Freeze

- Enrollment Extract Data
  - It is the universities' responsibility to verify the enrollment extract data BEFORE the data extract is copied (or frozen), as after that time no changes will be made to the data.
  - Exceptions to this policy will only be granted in rare cases where the impact is considered significant to the Executive Director of the Board of Regents for accountability.

- To appeal and recommend a change to the frozen extract, the following procedure will be followed:
  - Requesting a change to frozen extract data will be made by:
    - University requests to change the frozen enrollment extract data will be made by the University President or designee.
    - BOR employee requests for changes should be made directly to the Executive Director or designee.
    - External constituents should request changes directly to the Executive Director or designee.
  - The following information needs to be forwarded to the System Data Administrator (SDA) or Executive Director:
    - Name of the university
    - Name of the person requesting the change to the frozen extract
    - Data elements to be updated
    - Costs/benefits of making the change
    - Justification to support the change after the data is frozen
    - Report programs already public that utilize this information
- Identification of Data Discrepancies
  - If a change to the frozen extract data is identified within two days of the extract, the request should be sent to the System Data Administrator (SDA). The SDA will evaluate the impact, taking into account whether or not the data has been used for reports which have been distributed, and will forward a recommendation to the Director of Regents Information Systems or designee. Should the RIS Director accept a recommendation to change the data, the RIS programmers will be duly notified. However, should the RIS Director deny a data change request, an appeal could be forwarded to the Executive Director or designee.
  - Discrepancies that remain in the data after the extract is frozen for any given term will be reported as they are or listed as errors in any reports generated from the frozen extract file.
  - If an appeal is denied, report programs will not be changed to hardcode around an error/discrepancy.
  - However, if an appeal is approved, the extract file will be changed so that future report programs do not have to include hard coding around the error/discrepancy.

Procedure for generating the 70-line report by residency, classification, and gender

Responsibility: University

Step 1 - Run Colleague process XEXT for current term .

Step 2 - Run download XSEX on XRIS menu.

- There are 3 input parameters:
  UNIV -- B, D, N, M, S, or U
  TERM -- FA, SP, or SU
  UNIV for FTP DIR -- BHSU, DSU, NSU, SDMT, SDSU, or USD

- The paragraph downloads some key fields from XH.<UNIV>.STU.<TERM>.EXTRACT into a member called X<UNIV>.<TERM>ENRLEXTR in XH.<UNIV for FTP DIR>.FTP.DIR.

  Example: download data from XH.B.STU.FA.EXTRACT to XB.FAENRLEXTR in XH.BHSU.FTP.DIR.

Step 3 - FTP X<UNIV>.<TERM>ENRLEXTR to dataset TS71.X0H.xxx.ENRLEXTR in Mainframe where xxx is BHS, DSC, NSC, SDMT, SDSU, or USD.

Step 4 - Run the batch submit job ENRLTABL.

- This job executes the SAS program that replaces the COBOL program and produces the 64-line report for state support, self-support, or total enrollment based on what parameter (ST/SS/AL) that you entered.

Specs of the 70-line report

When you run with parm = ST
  Only state support students are included (XH.FE.STATE.FLAG = Y).
When you run with parm = SS
  Only self-support students are included (XH.FE.NON.STATE.FLAG = Y).
When you run with parm = AL
  All students captured in the extract are included.

Lines 1 – 64 are headcount/FTE broken down by residency status, class (XH.FE.STA.CLASS), and gender (XH.FE.GENDER).
Lines 1-21: total
Lines 22-42: residents (XH.FE.STU.RESIDENCY.STATUS = R)
Lines 43-63: non-residents (XH.FE.STU.RESIDENCY.STATUS = N)

Lines 65-67: include undergraduate degree seeking non-pharmacy students. (XH.FE.STA.CLASS = FR, SO, JR, SR)

Line 65: first time (XH.FE.STA.ENROLL.STATUS = F)
Line 66: transfers (XH.FE.STA.ENROLL.STATUS = T, TS)
Line 67: readmits (XH.FE.STA.ENROLL.STATUS = R)

Line 69: graduate transfers (XH.FE.STA.CLASS = MS, DR, UN and XH.FE.STA.ENROLL.STATUS = T, TS)

Line 70: 1st professional transfers (XH.FE.STA.CLASS = PH, LA, MD, AU, PT and XH.FE.STA.ENROLL.STATUS = T, TS)

FTE divisors:
15 for classes FR, SO, JR, SR, SP, LA
12 for classes MS, DR, UN and Line 69
19 for MD
17.3 for PH
17 for Line 64

Defining the IPEDS Institutional Characteristics Parameters

Responsibility: University
Timeframe: October

Follow the steps below to enter information needed to produce the Institutional Characteristics report.

Note: If your institution does not use SAT or ACT scores as a part of the admissions criteria you do not need to access the IPEDS Inst Char Params (ICHP) screen.

Step 1 - Access the IPEDS Inst Char Params (ICHP) screen.

Step 2 - If your institution uses SAT scores as a part of the admissions criteria, enter SAT Verbal and SAT Math noncourse information.

- If your institution does not use SAT scores as a part of the admission criteria, continue to the next step.

Step 3 - If your institution uses ACT scores as a part of the admission criteria, enter ACT Composite, ACT English, and ACT Math noncourse information.

- If you institution does not use ACT scores as a part of the admissions criteria, continue to the next step.

Step 4 - Save the information by finishing from the screen.

Generating the IPEDS Institutional Characteristics Reports

Responsibility: University
Timeframe:

Note: Institutional Characteristics can never be modified once they have been submitted to NCES/IPEDS.

Procedure for Producing Survey 1

Complete the following steps to produce Survey 1 of Institutional Characteristics report.

Step 1 - Access the IPEDS Inst Chars Survey 1 (XCH1) screen.

Step 2 – Enter your university designator at the prompt

Step 3 - Enter the Reporting Dates.

- Enter Begin and End dates to define the time frame for the report.
- A typical time period for IPEDS is one calendar year.

Step 4 - Enter a conversion factor in either the Credit to Contact Hour or Cmpl Months to Contact Hour Conversion Factor fields.

Step 5 - Enter any academic levels are necessary.

Step 6 - Save you work and finish from the XCH1 screen.

- Colleague produces part 1 of the Institutional Characteristics Report.

Procedure for Producing Survey 2

Complete the following steps to produce Part 2 of the Institutional Characteristics report.

Step 1 - Access the IPEDS Inst Chars Survey 2 (XCH2) screen.

Step 2 – Enter your university designator at the prompt

Step 3 - Enter the following required information:

- Official Fall Reporting Date
- Reporting Dates

Step 4 - Enter Credit Types to be counted as either credit hours or clock/contact hours.

- Enter credit types in the Undergrad Hr Cred Types field.
- You cannot enter the same credit type into both fields.

Step 5 - Enter First Professional Course Rules.

- If your institution does not offer first professional courses, leave this field blank.

Step 6 - Enter all the Fall Terms for the 12-month reporting period.

Step 7 - Enter specific academic levels to be included on the report

- If you do not enter information in the Academic Levels field, all academic levels are reported.

Step 8 - Enter the following information to be excluded or included on the report:

- Departments
- Divisions
- Locations
- Use the corresponding include or exclude fields to limit information on the report - If you do not enter information in any of the fields then all departments, divisions, and locations are included in the report.

Step 9 - Enter school IDs to include only certain schools in the report.

- If you leave this field blank, all schools are included in the report.

Step 10 - Enter a Saved List of STUDENTS to limit the information included in the report.

Step 11 - Save you work and finish from the XCH2 screen.

- Colleague produces part 2 of the Institutional Characteristics Report.

Defining IPEDS Fall Enrollment Parameters

Revised
1/12/05

Responsibility: University
Timeframe: November

Follow the steps below to define the parameters for the Fall Enrollment report.

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

Note: The part-time students will be determined the same way as the full-time students are—by term, level, the dates on the parameter screen and the STC records, using the part-time credit range on ACLV.

Step 1 – After Oct 15th, run XEXT to create a current extract of students

Step 2 - Access the IPEDS Fall Enrollment Params (XFEP) screen.

- Enter your university location at the prompt

Step 3 – Enter your university designator at the prompt

Step 4 - Verify the correct Official Reporting Month/Day/Yr is displayed.

- The month and day default to October 15.
- Change the year to the year that should appear on the Fall Enrollment Survey.

Step 5 - Enter Credit Type Categories that should be counted student when processing the Fall Enrollment Survey.

- Enter I for institutional

Step 6 - Enter information in the following optional fields as needed:

- Non-Resident Alien Rules
- Transfer Student Rules
- Undergraduate First/Second/Third/Fourth Year Classes
    - Enter FR, SO, JR, SR
- Undergraduate Degree Types
    - Enter B, A
- Undergraduate CCD Types
- Contact Hours Rules
- 1st Professional Degree Types
- 1st Professional CCD Types
- Ist Professional Program Types
- Grad Load Rules/Loads
- Non-Foreign Locations

Step 7 - Save the information by finishing from the screen.

Generating the IPEDS Fall Enrollment Survey

Responsibility: University
Timeframe: After Chosen Reporting Date, before Enroll Status update for Spring term

Complete the following steps to generate the Fall Enrollment report for the IPEDS Fall Enrollment Survey.

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

Set the Parameters for the Current Year
Step 1-Access the IPEDS Fall Enrollment Params (XFEP) screen.

Step 2 – Enter your university designator at the prompt

Step 3—Enter the office reporting month/day/yr (either Oct 15 or the BOR census date)

Step 4—Enter the Credit Type Categories – I Institutional

Step 5—Nonresident Alien Rule

WITH STU.ALIEN.FLAG EQ 'Y'
AND STU.IMMIGRATION.STATUS NE 'PR'
(AND …. For all other statuses that are considered resident aliens—? A1, P1,R1,R2,RA?)

Step 6—Enter Transfer Student Rules

Rule 1: WITH XN.STU.ENROLL.STATUS EQ 'T'
OR XN.STU.ENROLL.STATS EQ 'TS'
(unfortunately this does not eliminate transfers who attended the institution previously. A check on institutional hours could eliminate some that should not be eliminated since some hours may be prior to HS graduation.)

Rule 2: WITH XM.STU.OPEN.PROGRAMS LIKE 'x.B…'
OR XM.STU.OPEN.PROGRAMS LIKE 'x.A…'
OR XM.STU.OPEN.PROGRAMS LIKE 'x.N…'
OR XM.STU.OPEN.PROGRAMS LIKE 'x.M…' (and any other degrees to be included)

Step 6—Enter Undergraduate First, Second, Third, Fourth Yr classes

FR, SO, JR, SR

Step 7 –Enter Undergraduate Degree Types

B, A,

Step 8 –Finish

Create Savelist to use to select records for creating the IPEDS Fall Enrollment Work File

Queries from XN.NP.BUILD.IPEDS.SAVELISTS

SELECT STUDENT.ACAD.CRED WITH STC.TERM = 'current term' 'previous summer' 'prev spring' 'prev fall' WITH SEC.LOCATION = 'univ' WITH STC.END.DATE GE 'mm/dd/yy' of reporting date WITH STC.START.DATE LE 'mm/dd/yy' of reporting date

SELECT STUDENT.ACAD.CRED SELECT.ONLY WITH STC.CURRENT.STATUS = 'A' 'N' OR STC.CURRENT.STATUS.DATE GT 'mm/dd/yy' of reporting date SAVING UNIQUE STC.PERSON.ID

SAVE.LIST XxIPEDSFA

(this may contain more students than will be in the work file, but will limit the number of records that will need to be processed)

Query academic history record to find records with end dates on or after reporting date that had grades entered prior to the reporting date.

GET.LIST XxIPEDSFA

SELECT PERSON.ST BY.EXP PST.STUDENT.ACAD.CRED SAVING PST.STUDENT.ACAD.CRED

SELECT STUDENT.ACAD.CRED WITH STC.GRADE NE '' WITH STC.GRADE NE 'IP' WITH SEC.LOCATION = <<UNIV:>> WITH STC.END.DATE GE <<'mm/dd/yy' (reporting date)>> WITH STC.START.DATE LE<<'mm/dd/yy' (reporting date)>>

LIST STUDENT.ACAD.CRED SELECT.ONLY ID.SUP BY STC.PERSON.ID STC.PERSON.ID STC.TER STC.SEC.NAME STC.CURRENT.STATUS STC.CURRENT.STATUS.DATE STC.START.DATE STC.END.DATE STC.GRADE HEADER'CHECK END DATE FOR GRADED SECTIONS'

Change end date on STAC/SACD on those records since the section ended before original end date (happens with correspondence courses that are completed early).

Create Work File and/or Print Report

Step 1 - Access the IPEDS Fall Enrollment Survey (XFES) screen.

Step 2 – Enter your university designator at the prompt

Step 3 - Do you want to build the work file, run the report, or both?

- Build the work file, enter **W**.
    - This is the first step using the saved list mentioned below.
- View the report, enter **R**.
    - This is the used after initially checking your data from the workfile. See Step 12 below.

- Build the work file and view the report, enter **B**.

Step 4 - Enter the Reporting Year.

Step 5 - Enter the Residence Address Type

- If a student's address is blank, the residence type entered here is used to find another address for the student. If this field is blank, the student address is left blank on the report.

Step 6 - Enter Y for the section of the report you want to print.

- Part A Total Enrollment
- Part A Total Enrollment by CIP
  - Major CIPs Reported
- Part B Enrollment by Age
- Part C/D4, 5, 6 by Residence
- Part D1 - Enrollment by Course Type
- Part D2-b - Enrollment by Acad Pgm
- Part D3 - Enrollment by Course Loc
- Part E First Time Undergraduate
- Enter **N** or leave blank the sections you do not want to print.

Step 7 - If you entered "Y" for Part A Total Enrollment by CIP, enter the CIP codes that should be included on the report.

- If you leave this field blank, all CIP codes are reported.

Step 8 - If you entered "Y" for Part E First Time Undergraduate, you must also enter a date that represent the start of a Summer term.

Step 9 – Enter your university code

Step 10 – Enter a savedlist name if applicable

- Created by XN.NP.BUILD.IPEDS.SAVELISTS (specific to NSU, would need to be saved to your VOCLIB and edited for your university specific information before using – this also looks for graded sections

Step 11 - Save your work and finish from the XFES screen.

- Colleague performs the process you specified.
- Queries for Part E First time Undergraduates which either Datatel does not have correct (<u>or</u> more likely is not correct because I can't identify first time transfers in a rule correctly) are at the end of this document

Step 12 - Run XN.NP.CHECK.IPEDS.FALL.ENRL to check for correctness of new freshmen

Note: Again, XN.NP.CHECK.IPEDS.FALL.ENRL is specific to NSU and would need to be saved to your VOCLIB and edited for your university specific information before using

- For any differences in new freshmen, check to see that coding is correct in Colleague (enroll status, HS Graduation degree type and date on HSA, TRCL or STAC for previous course enrollments). If errors are found, rerun XEXT and/or XFES. HS grads who took courses spring or summer may have a problem with HS grad date and the summer start date.

Note: If a student completes a correspondence course before the end date, IPEDS enrollment reporting and repeats may be affected if the end date is not changed.

- For IPEDS enrollment reporting, IPEDS wants a report on all students (and only those students) who are actively enrolled as of reporting date; also fulltime/parttime should be determined based on those courses (and only those courses). This should include any course with a start date on or before reporting date and an end date on or after reporting date (regardless of the term).

- For repeats, if a student drops out of the correspondence course and registers in a regular section, the end date of the regular section may be before the correspondence end date. In this case, the last take of the repeat will be the correspondence section and not the regular section.

Step 11 - Run XFES using the option to Print the reports only.

- If CIP 240000 needs to be reported, add the numbers from Part A - BLANK CIP CODE to Part A - 240000.

Step 12 - Run XN.P.DOWNIPED to download IPEDS Fall Enrollment Work File and create savelists to use to update cohorts in Colleague
Note: The paragraph and savedlists are NSU specific and would need copied to your VOCLIB and modified by each university before using. This paragraph contains the queries for Part G which the Datatel report does not do correctly *and it also includes a section that NSU does for our Institutional Researcher on SAT and ACT score for new freshmen.*

Step 13 - Update Fed cohort field with the current year code

Queries for Part E:
To find first time transfers
34 SELECT S54.IPEDS.WORK.N WITH SIWN.TRANSFER.STUDENT = Y WITH SIWN.ACAD.LEVEL =
 UG
33 SAVE.LIST XNIPEDTR
32 GET.LIST XNIPEDTR
31 SELECT PERSON.ST BY.EXP PST.STUDENT.ACAD.CRED SAVING PST.STUDENT.ACAD.CRED

0 SELECT STUDENT.ACAD.CRED WITH STC.CRED.TYPE = 'NMI' 'NMIR' OR WITH SEC.LOCATI
ON = NSU
29 SELECT STUDENT.ACAD.CRED WITH STC.TERM # 2009FA WITH STC.TERM # 2010SP WITH STC
.TERM # 2009SU WITH STC.TERM UNLIKE '…H…'
SELECT STUDENT.ACAD.CRED WITH STC.CURRENT.STATUS # 'X'
SELECT STUDENT.ACAD.CRED WITH STC.CURRENT.STATUS # 'C'
SAVE.LIST XNTEM
13 GET.LIST XNTEM
12 LIST STUDENT.ACAD.CRED BY STC.PERSON.ID BY STC.TERM BREAK.ON STC.PERSON.ID BR
EAK.ON STC.TERM DET.SUP TOTAL STC.CRED XN.STC.LAST.HS.YEAR HDR.SUP

Scan through list looking for those who did not have a class after HS graduation

```
Person ID. Term............................... Reg Cred Last HS Grad
Year
1424527    2003FA                                   8.00
04
1424527                                             8.00
```

GET.LIST XNTEM
For each student found without a class after HS graduation

SELECT STUDENT.ACAD.CRED WITH STC.PERSON.ID # 1424527

After last one

SELECT STUDENT.ACAD.CRED SAVING UNIQUE STC.PERSON.ID
SAVE.LIST XNOTNEWTR

Ask Suzanne to change SIWN.TRANSFER.STUDENT to N

To find first time non-degree seeking:
SELECT S54.IPEDS.WORK.N WITH SIWN.ACAD.PGMS = '' 'N.SPEC.SPEC'
SAVE.LIST XNONDEG (total number non-degree seeking)
GET.LIST XNONDEG
SELECT PERSON.ST BY.EXP PST.STUDENT.ACAD.CRED SAVING PST.STUDENT.ACAD.CRED
SELECT STUDENT.ACAD.CRED WITH STC.TERM # yyyyFA WITH STC.TERM # yyyySU WITH S
TC.TERM # yyyySP WITH STC.TERM UNLIKE '…H…' (remove current term, previous summer term, and any pre-registration terms and HS level)
SELECT STUDENT.ACAD.CRED WITH SEC.LOCATION = NSU OR STC.CRED.TYPE ='NMI' NMIR'
SELECT STUDENT.ACAD.CRED WITH XU.STC.OVR.CENSUS.STATUS = '' 'N' 'A'
SELECT STUDENT.ACAD.CRED WITH STC.CURRENT.STATUS # 'X' WITH STC.CURRENT.STATUS # 'C'
SAVING UNIQUE STC.PERSON.ID (number who were at NSU previously—subtract from total to get first time non-degree seeking)

Generating the IPEDS Completions Report

Responsibility: University
Timeframe: October

Complete the following steps to generate the Completions report for the IPEDS Completions Survey.

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

Step 1 - Access the IPEDS Completions Survey (XCMP) screen.

Step 2 – Enter your university identifier at the prompt

Step 3 - Enter the Twelve-month Reporting Dates.

- The typical time frame is July 1st to June 30th.

Step 4 - Enter any degrees or certificates that should be included on the report.

- You may enter any one category of degrees:
    - Associate Degrees
    - Bachelor's Degrees
    - Master's Degrees
    - Doctor's Degrees
    - The CCDs entered in the post-baccalaureate and post-master's certificates fields are mutually exclusive.

Step 5 - Enter the following information to be included or excluded on the report:

- Academic Program
- CIP codes
- Degrees
- CCDs

- Use the corresponding include or exclude field to limit information on the report. If you do not enter information in any of the fields then all academic programs, CIP codes, degrees, and CCDs are included in the report.

Step 6 - Save your work and finish from the XCMP screen.

- Colleague produces the Completions Report.

Defining the IPEDS Graduation Rate Survey Report Parameters

Revised
4/5/06

Responsibility: University
Timeframe: March

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

For GRS, the data from 6 years which is the original cohort can be adjusted (and explained) when doing the current year's GRS

Note: In IPEDS, fulltime students are only those students who are enrolled in courses as of Oct 15 or other reporting date that have started on or before reporting date in the cohort year and ended after 10/15 or other reporting date in the cohort year with a total of 12 or more credits.

Beginning with the Spring 2010 collection, the GRS needs to be run twice: once for the fall cohort from six years ago (2003 in Spring 2010) using the athletic information and once for the fall cohort from 8 years ago (2001 in Spring 2010) .

Step 1 - Access the IPEDS GRS Report Parameters (XPRM) screen.

- Enter your university location at the prompt

Step 2 – Enter your university designator at the prompt

Step 3 - Enter the Cohort Method used at your institution.

- Enter F – Fall Cohort Method
- Enter a reporting date by using the Official Fall Reporting Month, Day
  - Enter 10/15 or other reporting date
- Enter Cohort Year and Reporting Period
  - There should be a 5 year span between Cohort Year and Athletic Aid Year.

Step 4 - Enter Credit Type Categories that should be used to determine which academic records to use when processing the Graduation Rate report.

- Enter I for institutional

Step 5 - Enter information in the following optional fields as needed:

- Non-Resident Alien Rules
  - Enter rule such as NRALIEN
- Transfer Student Rules

  - A savelist must be used when running XGWF since there are no fields in Colleague that can be used to accurately determine who was a transfer student to your university in the cohort year.
- Bachelor Degree Types
  - Enter B
- Good Academic Standing GPA
  - Enter 2.0
- Athletic Aid Year
- Sport
  - F, BK, BB, T, O
  - Athletic Aid Year Rule
  - F WITH STU.OTHER.COHORT.GROUPS EQ 'xFyyF' where x is University identifier and yy is Athletic Aid year
  - OR STU.OTHER.COHORT.GROUPS EQ 'xFyyS' where yy is year of the spring term following the aid year
  - BK WITH STU.OTHER.COHORT.GROUPS EQ 'xKyyF'
  - OR STU.OTHER.COHORT.GROUPS EQ 'xKyyS'
  - BB WITH STU.OTHER.COHORT.GROUPS EQ 'xByyF'
  - OR STU.OTHER.COHORT.GROUPS EQ 'xByyS'
  - T WITH STU.OTHER.COHORT.GROUPS EQ 'xTyyF'
  - OR STU.OTHER.COHORT.GROUPS EQ 'xTyyS'
  - O WITH STU.OTHER.COHORT.GROUPS EQ 'xcyyF' repeat these 2 lines for each of the other sports at your university
  - OR STU.OTHER.COHORT.GROUPS EQ 'xcyyS' substituting the cohort letter of the sport for the 'c'
  - Cohort Year Rule
  - Rules similar to the Athletic Year rules except using the Cohort year instead of the Athletic Aid year

Step 6 - Enter information in the following fields only if you are a four year institution:

- Contact Hours Rule
- Cohort Year Rule (used in conjunction with the Sport field)
- Neither of these fields are required, but information should not be entered if you are a two year institution.

Step 7 - Save the information by finishing from the screen.

Building the IPEDS Graduation Rate Survey Workfile

Responsibility: University
Timeframe: March

Complete the following steps to generate the work file.

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

For GRS, the data from 6 years which is the original cohort can be adjusted (and explained) when doing the current year's GRS

Step 1 - Access the IPEDS GRS Work File Creation (XGWF) screen.

Step 2 – Enter your university designator at the prompt

Step 3 - Enter Y in the Clear File or specific years in the Clear Years field, if you want to remove data from the work file before adding new data.

Step 4 - Enter Y if you want to bypass the first-time check.

- Enter Y if you want the process to check the records in your savelist; otherwise enter N
- Saved List Name
    - Create a saved list by selecting Fed Cohort from STUDENT.ACAD.LEVELS and saving STA.STUDENT

Step 5 - Enter any of the following optional criteria:

- Student Types
- Locations
- Federal Cohorts
- Other Cohorts
- Academic Levels
- Academic Programs Included/Excluded

Step 6 - Save your work and finish from the XGWF screen.

- Colleague builds the work file.

Generating the IPEDS Graduation Rate Survey Report

Responsibility: University
Timeframe: March

Complete the following steps to generate the Graduation Rate Report.

Note: Before processing the GRS report, check that the Athletic cohorts for the athletic aid year and the cohort year have been entered in the Other Cohorts field on STAL.

Note: Check that any IPEDS exclusions and 'transfer outs' for students in that year's Federal Cohort were entered on SWTH with a Hiatus Code that was the Academic Withdrawl set to Yes on HIAT. (exclusions include Death, Military Activation, Official Church Mission, Fed Gov Foreign Aid)

Note: Institutions are allowed to make revisions to only the available surveys during a defined time period using the Prior Year Revision System. For this fall cycle, for example, changes to the prior year completions report only can be made - (Institutional Characteristics cannot be modified). In the upcoming winter cycle, changes can be made to the fall enrollment survey from last fall.

For GRS, the data from 6 years which is the original cohort can be adjusted (and explained) when doing the current year's GRS

Step 1 - Access the IPEDS Graduation Rate Survey (XGRS) screen.

Step 2 – Enter your university designator at the prompt

- This will default after the first time you use XGRS

Step 3 - Enter the cohort year.

- Colleague defaults this year from the XPRM screen. You can change the year if necessary.
- This is for the Retention/Graduation Rate part of the report.

Step 4 - Enter the type of survey form you want to use.
The following is a list of the available form from which you can select:

- GRS-1: Sections I, II, III, V, VI
- GRS-2: Sections III, IV, V, VI
- GRS-2A: Sections III, V, VI
- GRS-3: Section III

Step 5 - Enter the sports for which you provide athletically-related student aid.

- If you leave this field blank, a Section VI of the report is not created.
- Enter F, BK, T, BB, O

Step 6 - Save your work and finish from the XGRS screen.

- Colleague generates the report.

Yearly Building Replacement Factor Update

Each Fall RIS receives official notification by the SD Office of the State Engineer of the fiscal year building cost index change. In response, RIS runs a program to update all buildings at each campus by this value. Once updated, campuses will be notified of the update. Campuses may run UniBasic program XH.HB.FAC.UTIL.RPT.COST.REP to see a listing of their buildings and the estimated replacement costs at any time.

Fact Book Report(s)

RIS provides some of the yearly Facilities Fact Book information to the BOR for inclusion in the BOR published Fact Book produced each Fall. Campuses also submit Facilities information based on their performance indicators to the BOR directly. Together, the campus-provided performance indicators and the RIS submitted information comprise the yearly Facilities information reported in the Fact Book.

Each October, RIS emails the campus Facilities group of the Fact Book deadline for the RIS-reported Fact Book information. At the time this email is sent, campuses should have had their Buildings estimated replacement cost value updated by the replacement factor for that fiscal year.

After campuses have been notified their estimated replacement costs of their buildings have been updated in the Fall, they should run UniBasic program XH.HB.FAC.UTIL.RPT.COST.REP repeatedly until the output is accurate. (See Facilities Reports section for more information on this program). Once campus data is accurate, the campus is to notify RIS. RIS will then create a backup copy of the campuses Building and Room data as well as route a copy of the output from XH.HB.FAC.UTIL.RPT.COST.REP to the BOR on behalf of the campus.

The BOR deadline for accurate, ie campus-approved output from XH.HB.FAC.UTIL.RPT.COST.REP is usually the first week of November each year.

Facilities Reports

RIS Written Reports

Datatel's Colleague product includes very few reports for Facilities Management purposes; therefore, RIS has written some basic UniBasic reports.

To run the following RIS written reports, the user must have access to the colon prompt. From the colon prompt the user need only type in the name of the program, ie :XH.HB.FAC.UTIL.RPT.COST.REP then <enter>. After entering, program execution will begin. If the program needs user-input parameters, prompts will display on the screen. The program will pause execution while waiting for the user to respond to each prompt.

The RIS-written reports and a short synopsis of each are provided below.

XH.HB.FAC.UTIL.RPT.COST.REP
This program lists all campus buildings whose usecode is not equal to 'TE', along with each buildings estimated replacement costs, original costs, bldg ownership status, usecode, intial cost per sq foot and repl cost per sq foot. Dollar totals are totaled, then the same amounts are subtotaled based on the usecodes.

XH.HB.FAC.CLRM.LAB.ASSIGN.AREA.TOTS
This program lists all campus buildings whose usecode is not equal to 'TE' along with each buildings ownership status, location, total of lab area in building, total of classroom area in building, and usecode.

Documentation for
XH.HB.FAC.CLRM.LAB.ASSIGN.AREA.TOTS

created April 18, 2000

This program was written to provide information regarding the amount of assignable area marked for Classroom and Laboratory use at an institution. The reported information is obtained from Datatel's Colleague Facilities module. The output from this program corresponds to Table 3 (p. 9) in the 1996 Facilities Inventory & Utilization Study publication.

Input Parameters:

1. **Do you want output sent to the printer: (Y)es or (N)o**
Enter Y to route the output to a printer, or N to view the output on the screen. The default is No.

2. **Do you want to suppress building detail listing: (Y)es or (N)o :**
Enter Y to suppress detail printing of each building and its totals, ownership status, location and use code. The default is Yes.

Program Errors/Warnings:

Error(s) will print if one of the three facilities files cannot be opened to be read. Consult RIS for problem resolution if you receive a file open error.

Warning(s) will print if a buildings associated information cannot be found in the XH.BUILDINGS file. Consult RIS for problem resolution if you receive this type of error.

Program Processing:
This program reads through all buildings defined at a campus. For each building found, the program writes relevant information for that building to the output report if detail suppress is not set to 'Y', then reads through each room defined in that building. For each room it encounters, the program:
- checks the primary use (field 3,RMSM screen) to see if it is marked for Classroom use or Laboratory use. If it is marked for either, the assignable area (field 13, RMSM screen) of that room is added to a running total for lab assignable area or class assignable area for that particular building. All buildings' lab area totals and classroom area totals are combined to report a total campus lab area and total campus classroom area that is double under-lined on the output.

According to the report specifications, "The space included in the table is all owned and leased space ... at the main campus site. Leased space located in a different city is excluded from the analysis. Agricultural Experiment Station farm and research facilities are also excluded."

To handle the above specifications, ie exclusions, a section at the bottom of the report titled "Totals when Excluding AES Use Buildings:" has been added to show the effect on the campus totals when these exclusions are taken into consideration both separately and together. These three additional totals are:
1. "All Main Campus Buildings Only" – is the campus total obtained in the first half of the report minus buildings whose campus location is not coded as main campus, and whose usecode is not AES.
2. "All Campus Buildings except LO and SF owned" – is the campus total obtained in the first half of the report minus buildings whose ownership code is coded as LO or SF, and whose usecode is not AES.
3. "All Main Campus bldgs only except LO and SF owned" – is the campus total obtained in the first half of the report minus buildings whose campus location is not coded as main campus, and whose ownership code is not coded as LO or SF, and whose usdecode is not AES, This total represents the net totals when all report specifications are taken into consideration, ie the amount of assignable area available for labs and classrooms for an institutions when totaling only the space contained in main campus buildings that are not coded as non-university buildings.

Partial list of **Primary Use Codes** used in Colleague. Those highlighted (class labs primarily) are used by Facilities.
CLAS for Classroom

Lab codes include:

ABRL	Animal Behavior Research Lab
AERL	Ag Engineering Research Lab
ALSV	Animal Rm Res Lab Service
ARCL	Art Class Lab
ASRL	Animal Science Research Lab
BCRL	Bacteriology Research Lab

BIRL	Biology Research Lab
BURL	Business Research Lab
CDRL	Child Dev & Behavior Lab
CHRL	Chemistry Research Lab
CMCL	Computer Class Lab
DGSL	Diagnostic Service Lab
DRCL	Drafting Class Lab
DSLS	Diagnostic Service Lab Support
DYRL	Dairy Research Lab
ENCL	Engineering Class Lab
FLCL	Foreign Language Class Lab
GVRL	Governmental Research Lab
HECL	Home Economics Class Lab
HERL	Home Economics Research Lab
HFRL	Human Factors Research Lab
INRL	Indian Studies Research Lab
LAB	Laboratory
LBSV	Lab Service
NSCL	Natural Science Class Lab
NUCL	Nursing Class Lab
OLAB	Open Lab
OLSV	Open Lab Service
PHCL	Pharmacy Class Lab
PHRL	Pharmacy Research Lab
POCL	Photography Class Lab
PRCL	Printing Class Lab
PSCL	Physical Science Class Lab
PSRL	Psychology Research Lab
PYRL	Physics Research Lab
RLAB	Research Lab
RLSV	Research Lab Service
TCCL	Tech Class Lab
TYCL	Typing Class Lab
VERL	Veterinary Sci Research Lab

Complete list of all **Ownership Codes** in Colleague:
OW Owned - Fee Simple
LP Leased - Purchase
LR Leased – rented
LO Leased-out/Non Univ Bldg
SF Shared Fac/Non Univ Bldg
OD Owned/Donated

Note: This program performs no updating to data.

Documentation for
XH.HB.FAC.UTIL.RPT.COST.REP

created Nov 18, 1999

This program was written to provide information regarding the initial and replacement costs in relation to the sq footage, ownership and use code of all buildings at an institution. The reported information is obtained from Datatel's Colleague Facilities module.

Input Parameters:
1. **Please enter your two-digit institution number: XX**
Enter your campuses two-digit institution number, where the codes are as follows:
   02 – USD
   03 – SDSU
   04 – SDMT
   05 – NSU
   06 – BHSU
   08 - DSU

2. **Do you want output sent to the printer: (Y)es or (N)o**
Enter Y to route the output to your default printer, or N to view the output on the screen. The default is No. If you wish to route the output to a printer other than your default printer, you must issue the SETPTR command prior to executing this program. When program execution finishes, remember to reset your printer back to the default printer by executing the PRINTER.RESET command.

Program Errors/Warnings:
Error(s) will print if one of the three facilities files cannot be opened to be read. Consult RIS for problem resolution if you receive a file open error.

Warning(s) will print if a buildings associated information cannot be found in the XH.BUILDINGS file. Consult RIS for problem resolution if you receive this type of error.

Program Processing:
This program reads through all buildings defined for a campus. For each building found whose usecode is not equal to 'TE', ie terminated, the program writes the following information to the output: building id and name, gross area in sq. ft, replacement cost, initial cost, usecode, ownership status, init cost per sq. ft and repl cost per sq. ft. Totals of the orig cost, repl cost, init cost per sq. ft, repl cost per sq. ft and gross area in sq. ft values are listed under the appropriate column.

A second set of subtotals occurs after the first set of sq. footage and cost totals. This second set of totals are sums of the same values that were totaled earlier except these totals don't include the values for buildings whose ownership codes equal SF, LR or are blank. These subtotals are then further broken down by usecode and listed separately.

Complete list of all **Ownership Codes** in Colleague:

OW	Owned - Fee Simple
LP	Leased - Purchase
LR	Leased – rented
LO	Leased-out/Non Univ Bldg

SF Shared Fac/Non Univ Bldg
OD Owned/Donated

Complete list of all **Use Codes** in Colleague:
ACAD Academic
AES Ag Ext/Research Farm
AUX Auxiliary
LEASE Leased
MUS Museum
NBLDG Non-Bldg/Misc
RVACX Rev/ Academic Mixed
RVFAC Revenue Facility
RVAC Revenue Used for Academic

Note: This program performs no updating to data.

Documentation for
XH.B.FAC.UTIL.RPT

updated Dec 10, 2004

This program is to report utilization information that reflects the level of usage of classrooms and class laboratories for the six universities on the Colleague system. This program does not update any data in the Colleague system. The formulas that are used for calculations in this utilization program are found in the Calculations section at the end of this documentation.

Mnemonic: XRUT

Input Parameters:
1. **Do you wish to run against the frozen extract file: (Y)es or (N)o**:
Enter a 'Y' to run against the frozen extract file. Note that this option should only be answered 'Y' after the frozen extract date. Prior to that date, this option should only be answered with a 'N'.

2. **Enter the term you wish to run against, ex. 1999FA, 2000SP, 2001SU**:
Enter the term you wish to run against. For purposes of the yearly Facilities Utilization Report output due to the BOR each Fall, you would choose the appropriate year FA term.

3. **Enter the Section start/cut off date, (MMDDYY):**
The date entered will determine whether courses are included in the processing or not. Classes with a start date after the section start/cut off date entered will not be included in the processing. This date is the same date that the course extract is frozen. When entering the date, do not use field delimiters.

4. **Enter term extract number, (choices are 1, 2, or 3):**
You will receive this prompt if you answered 'Y' that you wish to run against the frozen extract. The extract is frozen at the following dates:

A. Fall semester: 1) Census date
2) IPEDS date
3) End of Term

B. Spring semester: 1) Census date
2) End of Term.

For purposes of the yearly Facilities Utilization Report output due to the BOR each Fall, you would choose the ‘2’ option corresponding to the IPEDS date for the Fall.

Suppression of some INFO messages can be done by answering the following prompt(s):

Suppress Instructional Methods INFO messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress Courses not assigned to CLRM or Lab messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress Course start date later than entered start date messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress courses assigned to off-campus location messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress courses with blank bldg and/or room assignment messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress invalid building messages, (Y)es or (N)o:
Enter a Y to suppress these messages. The default is No.

Suppress non-primary cross-listed section messages, (Y)es or (N)o: ':
Enter a Y to suppress these messages. The default is No.

It is suggested that during initial runs, you not suppress any messages. After you have checked the warnings and are sure they are OK and you do not wish to change any, you should then suppress them so you needn’t weed through them each run if you’ve already previously established they are OK.

*Note that when these reports are turned in to the BOR, all suppression parameters should be answered No so a full listing of warnings, errors and messages are available in the output.

Program Errors/Warnings:
Note that some messages list the classroom, building or course id currently being processed in the message body. These items are prefixed with a & in the error messages so as to designate them as variables within the message.

CANNOT OPEN XH.ENRL.SECTION FILE
This extract file does not exist in your account. Contact RIS.

CANNOT OPEN X&Campus.CRS.FA.EXTRACT FILE
This extract file does not exist in your account. Contact RIS.

CANNOT OPEN X&Campus.CRS.SP.EXTRACT FILE
This extract file does not exist in your account. Contact RIS.

CANNOT OPEN X&Campus.CRS.SU.EXTRACT FILE
This extract file does not exist in your account. Contact RIS.

INITIAL PRIME OF F.CRSES FAILED
This error is usually the result of mistyping an input parameter, such as the section start/cut off date or the term extract number. Try running the program again. If the error continues, contact RIS for help.

CANNOT OPEN XH.BUILDINGS FILE – CONTACT RIS
Contact RIS.

CANNOT OPEN BUILDINGS FILE – CONTACT RIS
Contact RIS.

CANNOT OPEN CLASSROOMS FILE – CONTACT RIS
Contact RIS.

Course id for &CRSES.ID assigned to &BLDG.ID*&ROOM.ID – course not processed since bldg/room not in facilities select list.
Contact RIS.

**** ERROR ** Classroom record not found for &CLRM.ID. Contact RIS**.
Contact RIS.

** ERROR ** &CLRM.ID Room Type is 'DEL'; Primary Usage is &usage code. Room improperly deleted – room record not processed.

The proper procedure to delete a room is to mark the usage code as 'DEL' and the room type as 'DEL'. Either this room is not to be deleted so that the Room Type code is incorrect and needs to be changed, or the room is to be deleted so the Usage code needs to be changed to 'DEL'. Make the appropriate change then rerun.

** ERROR ** &CLRM.ID Primary Usage is 'DEL'; Room Type is &room type. Room improperly deleted –room record not processed.

The proper procedure to delete a room is to mark the usage code as 'DEL' and the room type as 'DEL'. Either this room is not to be deleted so that the Primary Usage code is incorrect and needs to be changed, or the room is to be deleted so the Room Type code needs to be changed to 'DEL'. Make the appropriate change then rerun.

** ERROR ** &CLRM.ID has 0 or empty value for number of stations for this room – room record processed, but will result in some erroneous calculations.

Go to the RMSM screen for the &CLRM.ID in question and fill in the number of stations, then rerun.

**** ERROR ** &CLRM.ID has 0 or empty value for room area – room record processed, but will result in some erroneous calculations.**
Go to the RMSM screen for teh &CLRM.ID in question and fill in the room area number, then rerun.

** ERROR ** Cannot read from the courses file for CRSES.ID &CRSES.ID.

Contact RIS.

**** ERROR ** Course &CRSES.ID has invalid start and/or end times, or is blank – record processed with default value of 0 length of class period.**
The section/course id has a blank or invalid start or end time. Fix the record, then rerun.

** ERROR ** XH.BUILDINGS record for BLDG.ID &BLDG.ID not found. Contact RIS.

Contact RIS.

** ERROR ** Course ID &CRSES.ID has blank or 0 value for credit hours – course record processed, but will result in some erroneous calculations.

This course has a blank or 0 credit hour value. Fill in the credit hour value, then rerun.

** WARNING ** Course ID &CRSES.ID has zero or blank number of students registered. Course record processed.

If this course should have students registered, fix the record, then rerun.

** WARNING ** Building condition not read for building &BLDG.ID.

Contact RIS.

** WARNING ** Building description not read for building &BLDG.ID.

Contact RIS.

** WARNING ** Building sector not read for building &bBLDG.ID.
Contact RIS.

** WARNING ** Building location not read for building &BLDG.ID.

Contact RIS.

**** WARNING ** Building &BLDG.ID is not valid – it is either marked for termination, is located off-campus, or has a building usecode of AES. Rooms in this building will not be processed.**
If any of these three items, ie usecode, location, or bldg condition, are incorrect, then correct and rerun.
Note: These WARNING messages can be suppressed using the suppression input parameters.

** WARNING ** Course ID &CRSES.ID for course &CRSES.NAME has a blank bldg and/or blank room assignment; course not processed.

Either the building and/or room assignment for this course is blank. Complete both items of information then rerun.
Note: These WARNING messages can be suppressed using the suppression input parameters.

** WARNING ** &CRSES.ID has blank or invalid days of class value – record processed, but course not factored in to Hours of Day Room Scheduled Table.

Courses should have a valid days of the week they meet if students are signed up for this course. Fix the days if necessary, then rerun.

** WARNING ** Classroom &CLRMS.ID has blank capacity. Record processed.

This classroom has a blank capacity. Fill in the capacity, then rerun.

**** WARNING ** Course ID *CRSES.ID for course &CRSES.NAME meeting in building &BLDG.ID has a blank sector coded for that bldg; course not processed.**
Go the BLDG screen and add a sector code for that building.

** WARNING ** Course ID &CRSES.ID for &CRSES.NAME assigned to room id &BLDG.ID*&CLRM.ID. This is an off-campus building – course not processed.

This course is assigned to an off-campus location.
Note: These WARNING messages can be suppressed using the suppression input parameters.

** INFO ** Course &CRSES.ID has instructional method(s) &methods – course record not processed.

Courses with the following instructional methods will not be processed by this program: B, I, J M, S, T, or U. If the course has more than one instructional method of which at least one is from the above list, the course will not be processed and all instructional methods assigned will be listed.
Note: These INFO messages can be suppressed using the suppression input parameters.

** INFO ** Course ID &CRSES.ID has start date &start date which starts later than the section start date of &section start date entered by the user – course record not processed.

This course starts after the section start cut off date. If the course has an incorrect start date. Fix the record, then rerun; otherwise, this message is informational.
Note: These INFO messages can be suppressed using the suppression input parameters.

** INFO ** Course ID &CRSES.ID for &COURSE NAME assigned to room id &CLRM.ID. This room not a classroom or lab – course not processed.

The building and room assigned to this course has not been coded as a lab or classroom. The use code for classroom is 'CLAS' and the use codes for labs are: ARCL, DRCL, ENCL, FLCL, HECL, MUPR, NSCL, NUCL, PHCL, POCL, PSCL, PRCL, TCCL.
Note: These INFO messages can be suppressed using the suppression input parameters.

** INFO ** Course ID &CRSES.ID for &COURSE NAME is a cross-listed course that is not a primary section. Course not processed.
Courses that are crosslisted have all their sections removed from utilization processing except for the primary section. Removing all but the primary section will reflect the correct weekly periods of use, however the head count of all cross-listed sections(including those removed from processing) is calculated in the utilization processing.

Program Processing:

This program reads through all classrooms. As each classroom is read, it is checked to see if its primary use code is a classroom or class laboratory. (See Valid Primary Use Codes). If so, it must also pass ALL of the following checks to be included in the utilization study: must belong to a building with location coded as main campus (MCL), must belong to a building not coded with usecode of AES, must belong to a building not coded with condition of terminated (TE), and the room itself must not be coded as deleted, ie both room type and primary usage of deleted. Next, all courses assigned to this room (or portions thereof if the course is assigned to more than one room) whose instructional methods are valid (See Instructional Methods) and who are not cross-listed sections that are not the primary sections are found, their information for processing read, and the resulting calculations accrued for the room. (See Calculations Section).

When gathering the course information, either the frozen extract information is used, or the working extract information is used based on whether the user answered 'Y' to the prompt 'Do you wish to run against the frozen extract.' Note that once the Fall Semester IPEDS/midterm date has passed, changes may no longer be made to the frozen extract for that Fall; however, changes can always be made to the Facilities information at any time.

Primary Use Codes:

Rooms with a Primary Usage of any of the following codes will be included in the utilization program:
Classrooms: **CLAS**

Labs: LAB, ARCL, CMCL, DRCL, ENCL, FLCL, HECL, NSCL, NUCL, PHCL, POCL, PSCL, PRCL, TYCL, and TCCL.

Instructional Methods Codes:

Courses that contain any of the following instructional codes will not be included in the utilization program: B, I, J, M, S, T, or U. If the course has more than one instructional method code, if at least one of them if an invalid code, ie one of the above listed, then that course will not be processed. Instructional methods that are left blank are processed.

Output:
Three files of information will be written to the campuses _HOLD_ file during processing. The names of these files are:

XH.HB.FAC.LAB.UTIL.RPT – output of class lab utilization
XH.HB.FAC.CLRM.UTIL.RPT – output of classroom utilization
XH.HB.FAC.ERR.UTIL.RPT – output listing of all errors, warnings and informational messages.

These three files of output can be viewed and/or printed from the UTFB screen within the Colleague menu system.

Calculations Section:
Numerous calculations are performed for each classroom. Following are the formulas used by the calculations.

Room Area = The area for that room as defined on the RMSM screen, field 13.

Weekly Periods of Use =
Total days taught * Length of class period

Length of class is calculated as follows:
Class Start Time is subtacted from the Class End Time giving the number of minutes the class is in session. Following is a sample of the process for determining the final length of a class period, which is based on a 50 minute period equaling 1 clock hour period with every 25 minutes equaling the half hour.

If minutes of class period > 0 and < 26
Length of class period = .5
If minutes of class period > 25 and < 51
Length of class period = 1
If minutes of class period > 50 and < 76
Length of class period = 1.5
If minutes of class period > 75 and < 101
Length of class period = 2
...

For example:
1) Room A has a class which meets from 10:30 to 11:20; = 50 min. or 1 class period; the class is in the room on MWF, 3 days, which would be 3 * 1 = 3 weekly periods for that one class.

2) Room A has a class which meets from 8:00 to 10:30; = 150 min. or 3 periods; the class is in the room on TTH, 2 days, which would be 3 * 2 = 6 weekly periods for that one class.

3) Room A has a class which meets from 8:00 to 9:45; = 105 min. or 2.5 periods; the class is in the room on MW, 2 days, which would be 2 * 2.5 = 5 5 weekly periods for that one class.

4) Total weekly periods for the room would be derived from adding the three previous examples as follows:

3 + 6 + 5 = 14 weekly periods for Room A

Contact Hours = (Num of students * Num of days) * Length of class period

Note: Accumulated by period for each room.

For example:
1) Room A has 30 stations, with a MWF class, 3 days, which is 1 period long. The calculation would be (30 * 3) * 1 = 90 potential contact hours for that room for that period for one week.

2) Room A has 30 stations, with a TTH class, 2 days, which is 3

periods long. The calculation would be (30 * 2) * 3 = 180 potential contact hours for that room for that period for one week.

3) Room A has 30 stations, with a MW class, 2 days, which is 2.5 periods long. The calculation would be (30 * 2) * 2.5 = 150 potential contact hours for that room for that period for one week.

4) Total potential contact hours from Room A would be derived from adding the previous three examples as follows:

90 + 180 + 150 = 420 potential contact hours for Room A

Average Class Meeting Size = Total students / Total Number of Days

Actual Stations = The number of installed stations as defined on RMSM, field 12.

Percent of Student Station Utilization (PCSS) =
(Contact Hours / Potential Contact Hours) * 100

Net Area Square Feet per Student Stations (NASF) = Room Area / Actual Stations

Average Weekly Room Hours = Weekly Periods / Number of Rooms

Space Factor = (NASF / (PCSS * Mean Hours) * 100)

Average Weekly Use of Student Stations = Total Contact Hours / Actual Stations

UniQuery Basics

Data stored in any of the Colleague files can be accessed and modified on-line via the Colleague on-line screens, or can be accessed via the colon prompt using UniQuery. Note that accessing data via the colon prompt requires 1) access to the colon prompt, and 2) knowledge of UniQuery.

Step 1 - Colon prompt access is granted to a userid by the campus security coordinator.

- Once a userid has colon prompt access, to move to the colon prompt from the on-line system enter 'XEX' at the menu, then <enter> to take the user out of the Student system and display the colon prompt:

Step 2 - From the colon prompt the user may now access, but not modify, their campus data using UniQuery.

- Following are a few basics regarding UniQuery. For more detailed information, consult the manuals titled 'Fundamentals of Data Retrieval' and 'Advanced Data Retrieval Training Manual' both created by Datatel. Each campus has a copy of each manual. Contact your campus computer technical department to obtain a copy.

Example: Counting number of Buildings.
:**COUNT BUILDINGS** (<-- query user types in at colon prompt – hit <enter> when done)
5 record(s) counted. (<-- answer to the query)
: (<-- system returns user to the colon prompt automatically)

:**COUNT XH.BUILDINGS** <enter>
5 record(s) counted.
:
(Note the number of BUILDINGS and XH.BUILDINGS should alwaysbe equal. If not, contact RIS for assistance.)

Example: List buildings. Sort buildings.
:**LIST BUILDINGS** <enter>
ADMN
HNWN
MANL
RIS
BTLR
5 records listed
:

:**SORT BUILDINGS** <enter>
ADMN

BTLR
HNWN
MANL
RIS
:

Example: List all data or only specific data for all buildings.
Use the syntax
: **LIST filename which-item-from-file data-element(s)-for-item**

Note: Refer to the Data Dictionary section for a listing of the data elements.
:LIST XH.BUILDINGS WITH @ID EQ 'HNWN' XHBLDG.FIRE.ALARM
XHBLDG.USECODE <enter>
Fire
XH.BUILDINGS Alarm XHBLD

HNWN PD ACAD
1 record listed

Example: List all data for a specific building.
:LIST XH.BUILDINGS WITH @ID EQ 'HNWN' ALL <enter>
XH.BUILDINGS HNWN
Inst ID 07
Bldg ID
XHBLDG.USECODE ACAD
Repl Cost 3,456,344
Orig Cost 2,787,978
Ins Y
XHBLDG.AIRCOND.TONS
Last Renov Cost
Num Floors 3
Tuck Point 1998
Roof Reb 1999
Fire Alarm PD
Last Paint 1990

1 record listed

:

Opportunity Scholar Reporting

Responsible: RIS/University
Timeframe: Oct 1, Mar 1 & July 1 for combined academic & fiscal report

Pending Enhancement Request:
The request to monitor nonremedial registration credits for the SD Opportunities Scholarship students will be combined with the proposed enhancement for monitoring registrations.

SD Opportunity Scholar Applicants

SD Opportunity Scholar Recipients
Eligibility Requirements:

- Eligibility/Continuing Eligibility requirements can be viewed at the following URL: http://www.sdbor.edu/documents/ScholarshipAppf123005revised.pdf

University Processing
Step 1 – Access the Award Detail Entry (AIDE) screen for the term for the applicant/student that meets the requirements above

- Enter xH201, xH202, xH203 or xH203 (where x is the university identifier) to award the Opportunity Scholarship

Step 2 – After the start of the semester but before the census day enrollment extract freeze, enter the students into the applicable institution cohort

- Enter individually on STAL

Or

- Create a Saved List containing keys to STUDENT.ACAD.LEVELS containing the students to be assigned an institutional cohort.
- See *Entering Cohorts* in the Curriculum manual for procedures

- The xSyyt cohort is entered each semester with the start and end date of the semester the student is eligible.
  - If the student becomes ineligible for the scholarship, the cohort for the current semester stays but a new cohort for next semester is not entered.
- The OXyyt cohort could be entered once/multiple times for students transferring from a non-regental university to a regental university with the start date of the first semester the student received the scholarship.

Step 3 – Run a query throughout the semester to determine students who have fallen below 15 non remedial, non repeated registered credits

- If someone shows up on that list then:
  - Access the AIDE screen and enter a D for denied for the next semester SDOP aid.

- For example, when awarding, award $500 in Fall and $500 in Spring, so if this happened in the Fall, enter a D for denied on the Spring $500 SDOP award code.
- Review upcoming semester as well for the scholarship and enter a D for denied on all.

Step 4 – Review the HS.UNITS for all the scholars to insure they meet the 37 semester units (18.5 yearly units) required by the BOR. When recording HS.UNITS, <u>all</u> units should be recorded, not just the minimum to reach 37.

Note: The BOR, Secretary of Education & the K-12 environment refers to units as a yearly measure. However, the Regental universities record HS.UNITS as a semester measure. When reports are delivered to the BOR, the measure needed needs to be determined.

Step 5 – Review the Eligibility Requirements for all scholars to insure they are met in Colleague

- Be graduated from high school with a cumulative average grade of "B" (3.0 on a 4.0 scale), or greater, for all work attempted;
- Be a resident of South Dakota at the time of graduation from high school;
- Take the test administered by the American College Testing Program (ACT) or the Scholastic Assessment Test (SAT) before being graduated from high school;
  - Receive a composite score on the ACT of at least 24 or a combined verbal and mathematics score on the SAT of at least 1070;

Step 6 – Review the Continuing Eligibility Requirements for all scholars to insure they are met in Colleague

- Eligibility/Continuing Eligibility requirements can be viewed at the following URL: http://www.sdbor.edu/documents/ScholarshipAppf123005revised.pdf

Step 7 – Enter a note code for eligibility status exceptions and exemptions

- As a general rule, the awarding institution is ultimately responsible for documenting a recipient's eligibility.
- Access the Student Notes (STNT) screen for the individual student for the semester
  - Enter one of the following note codes to track if a student is eligible because of an exception to the initial or continuing requirements. A blank note code assumes eligibility based on passing the initial or continuing requirements.
    - Note codes should be entered for the semester after the student loses their eligibility. For example, a student drops below 15 credits in S05, so they are ineligible for F05. F05 is when the note code is entered. If the student is not registered for fall, the note code would not be entered until the semester the student returned.
  - Temporarily ineligible versus ineligible.

- Ineligible is to be used when the recipient is permanently disqualified from the program.
    - The only way a recipient moves from an ineligible state to eligible is with an Executive Director exemption.
    - An SDOS recipient is permanently disqualified from the program if they fail the proficiency exam. An Executive Director exemption is required to change the eligibility status of the recipient.
    - An SDOS recipient is permanently disqualified from the program if they refuse to take the proficiency exam. An Executive Director exemption is required to change the eligibility status of the recipient.
    - They would be temporarily ineligible if it was only GPA- but if the student also did not complete 15 hours, they are permanently ineligible.
- Temporary ineligibility is not a permanent disqualification from the program
    - A good example of temporarily ineligible is a recipient who has been in good standing but went below the minimum CUM GPA requirement. The recipient has the ability to get back in the program if they raise their CUM GPA to the min standard of 3.0. Eligibility information would be documented as temporarily ineligible because they did not meet the minimum CUM GPA requirements. The following term, if meeting the CUM GPA standard, they would be documented as eligible.
    - Document ineligibility in the next term the recipient is enrolled. So, if John Doe was ineligible in Spring 2005, enrolled in Summer 2005, then it shall be documented under Summer 2005 that he lost eligibility.

Eligible:
Above Min GPA - OEAMG
Exec Dir Exemption – Military - OEXMI
Exec Dir Exemption – Medical - OEXMD
Exec Dir Exemption - Progressive Exam Reqs - OEXPE
Exec Dir Exemption - Non-SD Attendance - OEXNS
Exec Dir Exemption - Course Load Reqs - OEXCL
Exec Dir Exemption - Consecutive Terms - OEXCT
Exec Dir Exemption - Exchange Program – OEXEP
Exec Dir Exemption – GPA Requirements – OEXGA
Exec Dir Exemption – HS Application Requirements - OEXHS

Ineligible:
Below Min GPA - OIBMG
Below Min Credits – OIBMC

Proficiency Failed – OIPRF
Proficiency Refused - OIPRR

Temporarily Ineligible:
Below Min GPA - OTBMG

- Enter the type of OS – Opportunity Scholar

Step 8 – Review other processing related to military students

- MINF – see *Entering Veteran's Information* in the CORE procedure manual
- SWTH – see *Withdrawing Students & Withdrawing Students for Military Activation* in the Curriculum manual
- NCWS – see *Part III – Entering Military Service Credit* in the Curriculum manual
- SPRO – see *Entering Student Types* in the Curriculum manual

RIS Processing
Step 8 – Pull the Opportunity Scholar report based on the xH201 award code

- Provide a copy for university review before BOR review

Scholarship recipients are identified by award code of xH201 (where x is B, D, N, M, S, or U) and a term action code not equal to D (declined) or R (refused) in the TA.ACYR file. The report contains information about all SDOS students, including students who received the scholarship in fall but not spring.

HS data, majors, and the current term enrollment info comes from the extract. Preceding term GPA, cumulative GPA, total hours completed comes from the STUDENT.TERMS file. For completed credit, PA credit is used. "Term Not Received Scholarship" is determined by the student's preceding term GPA, if it is less then a 3.0, the field contains this term; otherwise the field contain NA. "Term Scholarship Reinstated" is NA. None of the SDOS students have taken the proficiency exam yet so the two proficiency exam fields are NA. The number of students who continue/lose eligibility is based on the scholarship students who enrolled this semester. Continuing/Losing eligibility is based on the previous term GPA of at least 3.0.

Step 9 – SDOS Administration System is updated with the regental university SDOS recipients

SDOS Admin System Reporting

Access

You must have a valid username and password to access the SDOS Administration System. This information is used to ensure you are an authorized user and grants you the appropriate permissions/roles to the system based on your credentials. For example, not every user has the ability to view the standardized reports.

Website

The live version of the SDOS Administration System is located on the Internet at http://www.sdbor.edu/administration/ris/reporting/SDOS or http://www.sdbor.edu/SDOS. Do not confuse the live version and test version of the website. During development, some personnel are granted permission to the test version. The test version is identical to the live version but contains "dirty" data and is evolving as the SDOS Administration System changes.

Login

When navigating to the website, you will be greeted with a page having a "Login" button. Clicking the button will initiate the login procedures which includes entering your username and password. For further assistance, there is also a hyperlink entitled "Login Help" containing additional details about logging into the SDOS Administration System.

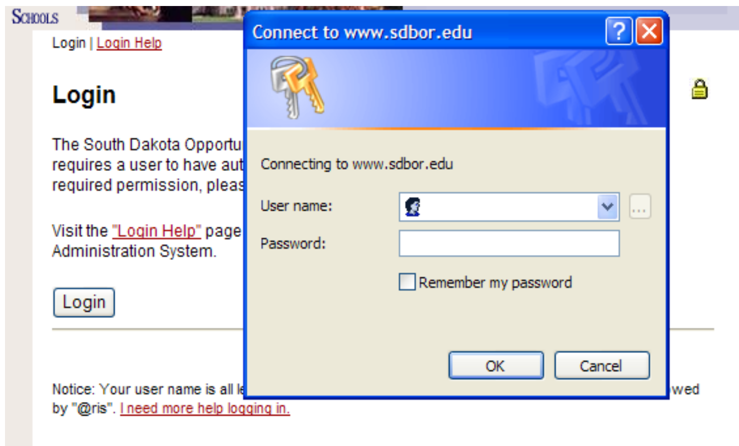

Figure 1 - Login screen

Reports

One of the features of the SDOS Administration System is its reporting capabilities. The system provides a set of standardized reports geared to answer the most common questions, i.e. total number of recipients, average test scores, etc. The system also provides a means for other reporting tools to link and perform ad hoc reporting.

There are 5 standardized reports available: 1) Recipient Report, 2) Recipients Cumulative GPA, 3) Recipients Status, 4) Recipients Test Scores and 5) Total Recipients.

Recipient Report

This report allows one to view, update and delete data related to an individual recipient. There are several security policies to note about the report:

a) Unless you are a member of the Board of Regents staff or an Administrator of the SDOS Administration System, you will only be able to view term data specific to your institution affiliation (Figure 19).

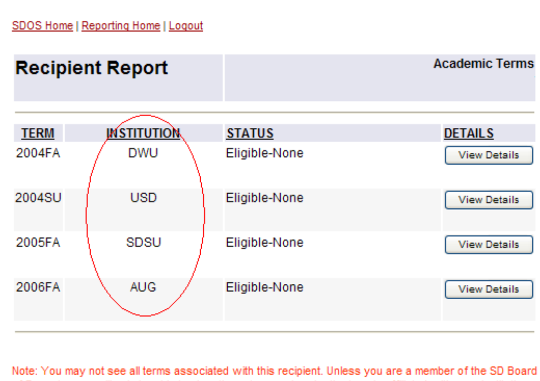

Figure 2 – Term Data

Furthermore, if you are adding a new term for a recipient, you will only be able to add a term associated with your institution affiliation. The "Awarding Institution" box is automatically set and disabled (Figure 20).

b) Recipient data can only be modified within a +-15 day window with respect to the "Distribution of Funds" date. For more details, see Section 6.1 – Security. The "Update" and "Delete" buttons are disabled in the Demographics and the Academic Term Details screens when this policy is being enforced.

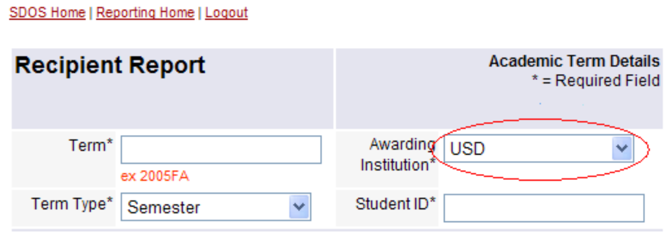

Figure 3 – Institution Affiliation

There are three available components to the Recipient Report: 1) General Demographics, 2) Academic Terms and 3) Academic Term Details.

General Demographics
This screen shows information such as the recipient's name, gender, ethnicity, address, high school history and SDOS entering cohort. The screen allows for "Updates" only!

Academic Terms
This screen shows a summary of the recipient's academic terms in order by term, institution and eligibility status. This screen also allows one to add a new term.

Academic Term Details
The Academic Terms screen allows one to drill-down into the details of a specific term. The Academic Term Details screen shows the details of the selected term by displaying the hours attempted, hours completed, cumulative GPA and eligibility status. The screen allows for "Updates" and "Deletes".

Recipients Cumulative GPA
This report is to show an aggregate of all recipients cumulative grade point averages ("CUM GPA") for a given cohort and term. It provides a view into the post-secondary academic progress of recipients and participating institutions.

Recipients Status
This report shows a detailed list of those recipients meeting a specified eligibility status. For example, you can configure a report to show all ineligible recipients of Cohort 2004FA for Term 2005SP.

Recipients Test Scores
This report shows an aggregate overview of recipients and their respective test scores among those participating institutions. The report shows the range, average and frequency of test scores.

Total Recipients

This report shows an aggregate of recipients for each participating post-secondary institution and/or secondary school based on selecting a cohort and term.

Athletic Reporting

Responsibility: RIS/Universities

Use the Campus Org Membership Detail (COMD) screen to add an individual membership to an organization/sport for all varsity athletic programs. Use Financial Aid (AIDE) for reporting on scholarship information. (For Fall 1997 only, use the Institution.Cohorts field. For the Other Sports Cohort, the sport will be pulled from campus organizations. For Fall 1998 forward, verify scholarship vs non-scholarship athletes via FA.)

Definition of athletic scholarship:

BOR 3:15 5.A Athletically Related Student Aid
A. Athletically related student aid means any scholarship, grant, or other form of financial assistance the terms of which require the recipient to participate in a program of intercollegiate athletics in order to be eligible to receive such assistance.

The policy definition implies that the source of the funds is not as important as the eligibility requirements. If non-athletes are also eligible to receive MI918s and MI919s, for example, then those awards would not be considered athletically related student aid. If, however, you have to be a member of at least one of the university's athletic teams in order to be eligible for the award, then it does not matter if the money is coming from the basketball budget and being given to a volleyball player.

Three reports have been requested by the Board of Regents;
(1) Degree Seeking Students Entering Spring 2003 or Fall 2003

- **Admissions by Exceptions Rates** (Basis of Admissions Codes ACX, AC3)
- **ACT English Scores**
- **ACT Math Scores**
- **Cumulative Grade Point Average as of end of Fall 2003**

(2) Students Testing for the First-time during Spring 2003 or Fall 2003

- **CAAP Pass Rates**
- **CAAP Performance**

(3) 1997 IPEDS Cohort

- **Highest Degrees earned as of August 31, 2003**
- **Graduation Rates**

RIS pulls varsity athletic programs based on the campus org type of ATHL and assigns term(s) to each athlete record pulled from CAMPUS.ORG.MEMBERS based on the campus org start/end dates for the individual.

<u>Adding a Campus Organization</u>

Step 1 – Access the Campus Organizations (COMT) screen

- The campus organizations should only need to be updated when changes to the organization occur after the initial setup.
- Maintenance of campus organizations will also be done from the COMT screen.
- If the organization already exists, enter the organization ID at the Organizations LookUp Prompt.
  - To display a list of all organizations, type the university identifier and '…' on the Campus Org LookUp prompt.
- If the desired organization does not exist, type in an ID that is five characters or less on the Campus Org LookUp prompt with the first character being the university identifier.
  - The prompt "Record not found -- Enter (A)dd or RETURN to Reenter:" will display. Enter "A" at the prompt to add the organization.
  - To reenter the organization ID press enter at the prompt.

Step 2 - The Campus organization ID will populate at the top of the screen.

- Enter information into the fields on the screen as follows:

  - Description: Enter the full name of the organizations.
  - Type: Enter ATHL for all athletic orgs.
    - This is how the Campus Organizations will be pulled for the report.
  - Purpose: Leave blank.
  - Default Role: Enter ATHL for Athlete.
  - Organization ID: Leave blank.
  - Locations: Enter location of organization (i.e. USD).
  - Year Approved: Enter the year the organization was approved.
  - Recharter Date: Record the charter update date each year.
  - Max Members: Enter the maximum number of athletes. Leave blank if no maximum.
  - Members/Advisors: An "X" will display when members or advisors exist.
  - Characteristics: Select the characteristics which best fit the organization.
  - Functions: Select the functions which best fit the organization
  - Sponsors: Leave blank.
  - Grouping: Enter the status of the organization.
  - Comments: Leave blank.

Step 3 – Update the COMT screen

<u>Adding an Athlete Membership</u>

Step 1 – Access or Org Membership Detail (COMD) screen directly or by detailing from the Campus Org Membership (CORM) screen

Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.

Step 3 - Enter the new member's name or Colleague ID at the Member LookUp prompt.

Step 4 – Enter the Start Date in the Membership Periods field

- Enter the date the athlete began their association with this sport
  - This may or may not be the same date as the beginning of the term
  - If the date is in the Summer, the athlete's first term to be counted for the report will be Fall
  - If the date is within the Fall term, the athlete's first term to be counted for the report will be Fall
- When a member is added to an organization, the default role will automatically display in the member's list of roles.

Step 5 – Update the COMD screen

Ending an Athlete Membership

Step 1 – Access the Org Membership Detail (COMD) screen directly or by detailing from the Campus Org Membership (CORM) screen

Step 2 - Enter the ID of the organization at the Organization LookUp Prompt.

Step 3 - Enter the member's name or Colleague ID at the Member LookUp prompt.

Step 4 – Enter the End Date in the Membership Periods field
If the athlete competed in at least one competition but later ended their association with the sport:

- Enter the date the person ended their association with this sport.
  - Enter the date the athlete no longer competed as an athlete, when/if they Withdrew, or when they graduated.

If the athlete should never be reported to NCAA:

- It is up to the university whether to:
  - Leave these athletes out of the CAMPUS.ORGS
  - Start **and** end date these athletes **before** the semester begins
  - Code these athletes in CAMPUS.ORGS with correct start/end dates (which may cross into a semester) and code them with the appropriate role for non-participation.

Step 5 – Review the Roles field

- ATHL will default in. If the athlete did not participate, the role should be changed to NP.
  - An NP Role will never be reported.

Step 6 – Update the COMD screen

Step 7 – RIS pulls the Athletic Reports based on the following:

South Dakota Colleague System Procedures

The base population for each table is degree seeking students entering during the fiscal year. Athletes (scholarship and non-scholarship) are compared to non-athletes with the population by admission by exceptions, ACT English/Math scores, performance on initial CAAP exams, and graduation rates.

Table 1 – Table 3 include first time degree seeking undergraduates in Spring 2003 or all 2003 census date extract.

- first time (XH.FE.STA.ENROLL.STATUS = F, T, or TS) degree seeking (XH.FE.STA.CLASS not SP) undergraduates (XH.FE.STU.ACAD.LEVEL = UG)
- Basis of admission codes ACX and AC3 are from STA.OTHER.COHORT.GROUPS in STUDENT.ACAD.LEVELS.
- ACT English and math scores are from XH.FE.NEW.ACT.BEST.xxx in frozen file

Table 4 – Table 5 include first time CAAP test takers in Spring 2003 or Fall 2003.

- CAAP test data are from STUDENT.NON.COURSES.

Table 6 includes all degree seeking undergraduates in Spring 2003 and/or Fall 2003 census date extract.

- Term GPA is from STTR.TERM.GPA in STUDENT.TERMS.
- Students who enrolled in both terms are counted once. But, their GPA from both terms are used in average calculation.
- Students who dropped/withdrew late and were captured in census date extract will not have a term GPA. They are not included in average calculation.

Table 7 includes 1997 IPEDS cohort.

- Students are checked against degrees conferred in the system (from ACAD.CREDENTIALS) and not just degrees from their original university. If BHS cohort received a bachelor degree at SDSU, the degree is counted.
- The university total cohort could be bigger than your original number if students participated in more than one sport.

Note: If athletes participated in more than one sport, they are counted once in each sport. If athletes participated in one sport in both terms, they are counted once in that sport. If they only received scholarship for one term, they are counted as scholarship athletes.

Athletes selection:
Exclude if sport start date = sport end date or role = NP
Athletes are included in a term if their start/end date interval covers the duration of the term.

Example: RYAT shows that FA03 started on 09/03/03 and ended on 12/19/03
An athlete is not counted in FA03 if sport start date is 09/01/03 and end date is 09/03/03
An athlete is counted in FA03 if sport start date is 08/01/03 and end date is 09/04/03

scholars selection:
FA 97: SELECT STUDENT.ACAD.LEVELS WITH STA.OTHER.COHORT.GROUPS LIKE D…981

- Athletes with other Cohort DO981 who participated in more than one sport are counted as scholarship athletes in all sports.

SP 03: SELECT TA.2002 WITH @ID LIKE …NI9…*2003SP AND XD.TA.AWD.CATEGORY = ’ATHM’ ‘ATHW’ AND TA.TERM.ACTION = ‘A’ ‘E’ ‘P’

FA 03: SELECT TA.2003 WITH @ID LIKE …NI9…*2003FA AND XD.TA.AWD.CATEGORY = ‘ATHM’ ‘ATHW’ AND TA.TERM.ACTION = ‘A’ ‘E’ ‘P’

Delaware Cost Study

Responsibility:
Timeframe:

Colleague Information:

- A data file is generated from RIS. Section data are from census date extract. Faculty data are from live Colleague. The file should come up with one faculty department per section per instructor. If an instructor teaches in more than one dept, the dept that pays for the instruction of the course should be listed. A report is submitted to the universities with faculty with no department or more than one department.
- For those who do not have a dept, please enter dept on FCTY screen. For those who have more than one dept, please update the spreadsheet by deleting the unwanted dept(s) and return the spreadsheet.
- RIS will route the report of Degrees Awarded to your printers. The report includes a detail listing and a table showing the number of degrees awarded and an average for the three years.

PayPerS Information

The final deadline for the 2004 Delaware Study is January 31, 2005. The information that is turned in should be with the CIP 2000 codes. Below are a few notes from last year which I updated that may help you with the study.

- RIS ran G3(CMWCIPDP). It dumped the information as it currently exists on the CIPDEP table on RPPB-TABLES. Campuses maintain the information that is on this file by using the XCCD screen.
- RIS ran G3(DEPTXWLS) to copy the 2003 Delaware Crosswalk Table (DEPTXW) to 2004. RIS sent e-mails with the list of records for each campus. The CIP codes on this table are the ones that are passed along through the study. They should include CIP 2000 codes. The DEPTXW table shows how a faculty department is linked to a Delaware department on PayPerS.
    - The majority of our departments in the cost study can be exactly matched with a national benchmark when using the 4 digit CIP code and the highest degree awarded. For those departments that can not be matched, the problem may be due to either the 4 digit CIP code, the highest degree awarded, or both. If we want to make as many matches as possible, I can make matches for those departments without exact matches by using benchmarks for the more universal 2 digit CIP code. For example, I can not match USD's 2699 (Biological Sciences/Life Sciences, Other) department with a national benchmark since no benchmark is provided for that four digit CIP code. To make a match, I could use the benchmark for 26 (Biological Sciences/Life Sciences). I think this would be reasonably fair since Delaware establishes the national benchmarks first at the 2 digit CIP code level and then again at the 4 digit CIP code level. Using this system, I can match every program campuses submitted 1999 cost study data on with a national benchmark except for SDSU's 01.06 baccalaureate program.

- For the 2002 Study and forward, RIS made changes to pull the information based on the Delaware Department on the budget records. Ensure that the Delaware Departments are properly coded or the budget lines will not get picked up properly.
- Currently the budget records are selected in BORDEL01 if they are in the fyr, for your institution, have class-code 300600-301900, have a Delaware Dept < '20000', SSN <= '899999999', account-no not starting with '4', CFTE > zero or Record-Type = 'O' or 'S', and the begin and end dates meet the qualifications outlined below. AES and CES records are no longer picked up for SDSU.
- To help you determine if you have the Delaware Departments set up correctly, RIS can change BORDEL01 to pick up all Delaware Departments (not just those < '20000') per your request. BORDELAB was changed last year to show all of the budget records for a person, not one line per person and dept.
- The academic dates RIS will use to select budget records will be 8-15-03 and 5-17-04.
- You can get a list of departments for your campus by submitting PP50HECS and running program XNSRFDEP. You can get a list of the Delaware departments for your campus by submitting PP50HECS and running program XNSRFDE1.
- Departments and Delaware departments are both stored on the RPPB-TABLES file. Departments are stored with '0', campus number, '0', and department number. Delaware departments are stored with '1', campus number, '0', and department number.
- If you have not received information from Delaware yet, you can e-mail Linda Graham (lindagra@UDel.Edu) and ask her to send you the info.
- Monte Kramer will be the BOR contact for the Delaware Study.

Submitting Information
Each university should have received a packet of information from Delaware containing the instructions for the 2000 Cost Study. One of the inserts included instructions on submitting data in Excel template format. If you have not received the 2000 packet of instructions or you need a copy of the Excel template instructions, please contact RIS.

A copy of the Excel template (cost00.xls) is available from their server.
IP Address: cost.irp.udel.edu
user: guest (all lower case)
password: cost (all lower case)

Process Notes:

- CMWCIPDP - CIP/DEPT information - reads the CIPDEP table, gathers the department description and writes out the campus, CIP, inst, department and department name. This file is passed to Biying for use in the graduation report.
- Biying creates several edit lists showing instructors with no SSNs, sections without an instructor, and sections without a subject.
- RIS runs G3(DEPTXWLS) which calls natural job DEPTXWLS to copy the DEPTXW table from one year to the next. This job can also be run in report mode.

- The key to the DEPTXW table is inst fyr and faculty dept. Campuses should be able to use XLVT DEPTXW to see the information for their institution.
- Campuses can use the XCDD, XADD and XDDD transactions (program XNSXCDD) to edit the information on the DEPTXW table if necessary. The key to the screen is fyr and faculty dept without a space between them.

- RIS runs GK(COSTSTUD) to create a file with the faculty course information. If the campuses have instructors in more than one department on Colleague, they can talk to RIS to override the data so it picks up the correct one. The campuses should come up with one faculty department per course per faculty member. If a faculty member is teaching in more than one department, the department that is paying for the instruction of the course should be listed. This job is picking up all funds for all campuses. Military sections (MSC, AIR, MIL) and sections with status of C (cancelled) are removed. It creates the ISIS.HECS.CHRISTY.COSTFY__ file which contains both Fall and Spring records.
- If records are changed on the PayPers or Colleague sides, re-extraction is necessary.
- In PayPerS, the jobs are run once to collect data for the Fall and then again to collect data for the Spring. The Fall run does include some Spring records that began in the Fall. The Spring jobs are run only to find the credit hours for the full year to fill Part B called Cost Data. Campuses do not verify the FTE in the Spring.
- Summer information is not included.
- Dollar information is not gathered in these programs. The amounts on the bottom portion of the report come from actual expenditures as reported in the actual column of the operating budget.
- The PayPerS jobs include:
  - G3(BORDELSX) - HWCMDELS - Colleague Extract - pulls in Biying's file and creates some reports about that information.
  - G3(BORDELPF) - HWCMDEPF - PayPers Fall Extract - picks up information for all of the campuses. No reports are created in this job. This job creates a file of Fall information and another file with Spring records that began in the Fall.
  - G3(BORDELJF) - HWCMDEJF - Joins PayPers Fall and Spring - joins the PayPers Fall and matching Spring files that were created in BORDELPF.
  - G3(BORDELPS) - HWCMDEPS - PayPers Spring Extract - picks up information for all of the campuses. No reports are created in this job. This job creates a file of Spring records that are not in the Fall.
  - G3(BORDELMN) - HWCMDELM - New Data Merge - merges the PayPers and Colleague information and the DEPTXW table.
  - G3(BORDELNB) - HWCMDELN - Instructors with No Budget - creates a report showing instructors without budget records.
  - G3(BORDELAB) - HWCMDELA - Instructors and All Budget - creates a report of ALL extracted budget records for an instructor (skips the crosswalk step).
  - G3(BORDELTB) - HWCMDELT - Totaled Merged Data Sorted by Column - takes the merged file and splits the information into the columns needed by Delaware. This job also creates an output file which can be downloaded into excel.

- SDSU worked with Excel to create a macro which puts the information in the format that is expected by Delaware. They are willing to share with other campuses.

Program Notes:
BORDELSX

This SAS program reads the file from Biying, ISIS.HECS.CHRISTY.COSTFY__, which contains the following information:

@01	inst	$2.	usd 02, sdsu 03, sdmt 04, nsu 05, bhs 06, dsu 08
@03	ssn	$9.	instructor ssn
@14	secid	$6.	a unique number for a section within a campus
@20	prim	$6.	a secid that links all cross listed sections together
@26	crslevl	$3.	course level 100, 200, 300...
@29	subj	$4.	subject
@33	crse	$4.	course number
@37	secno	$4.	section number
@41	tothrs	7.2	total hours enrolled in that section
@48	enrl	3.	total students in that section
@51	xenrl	3.	total students in all cross listed sections
@54	id	$7.	instructor Colleague ID
@61	load	6.2	faculty work load
@67	pct	6.2	% responsibility for teaching the section
@73	term	$3.	001 for Fall, 002 for Spring
@76	instm	$1.	instructional method R for lecture, L for lab...
@77	acadlevl	$1.	course academic level U for undergraduate, G for graduate
@78	dept1	$5.	faculty dept 1
@83	support	$2.	indicates self or state support

The infomation is sorted, merged and arranged to create reports of the cross listed, dual listed and all section reports for a campus. A few notes on this include:

- Special logic was added for DSU to move a few records into different faculty departments.
- All uncategorized are placed in Supplemental Faculty.
- Cross listed section - A section cross listed with another section in a different discipline. For these type sections, only the section listed as primary will carry the section value.
- Dual listed section - A section cross listed with another section within the same discipline. Only the section with the most credits will carry the section value.
- Sections cross and dual listed. These sections are handled like dual listed sections.
- Sections with cross listings in which the cross listed section was not found in the extract will be treated as stand-alone sections and will carry section value.
- These methods only apply to assigning section value. Credit hours are distributed based on each individual section characteristics, regardless of cross/dual listing.

The program also adjusts the percent responsible if necessary to address problems with sections in which the total % responsibility for all instructors does not equal 100%. The program recalculates the % responsibility based on each instructors % of the total for all instructors assigned to the section.

This job is run for either fall or spring and it builds the following corresponding datasets: RPPB10.campus.PROD2.BORDEL01.FALLyear or RPPB10.campus.PROD2.BORDEL01.SPRGyear. These datasets include the information that was passed in except the percent may be adjusted and a section value is added to the end of the file. It produces the following reports:

CROSS LISTED SECTIONS WITH NO CORR. PRIMARY SECTION
CROSS LISTED PRIMARY SECTIONS WITH NO REFERRING SECT
CROSS & DUAL LISTED PRIMARY SECTIONS DEFAULTED TO DUAL
ALL SECTIONS AND THEIR ASSIGNED SECTION VALUE

BORDELPF and BORDELPS

These jobs run the same natural program (BORDEL01), but information is pulled for Fall or Spring based on the input parameters. For the Fall run, BORDELPF is run. It contains logic to call BORDEL01 twice; once for Fall and once to find some Spring records that will be merged with the Fall records in the next job (BORDELJF). It builds the following files; RPPB10.HECS.PROD2.BORDEL01.FA1Xyear, RPPB10.HECS.PROD2.BORDEL01.SP1Xyear and RPPB.HECS.PROD2.DEPTXW.FALLyear. For the Spring run, BORDELPS is run. It builds the RPPB10.HECS.PROD2.BORDEL01.SP2Xyear file and overwrites the RPPB.HECS.PROD2.DEPTXW.FALLyear file. The parameters include TERM BEGINST ENDINST BEGDATE ENDDATE FYR.

This job reads the PayPers files and creates files of the personnel/budget information and the DEPTXW table.

The budget information is selected from RPPB30-BS-MASTER for the institution and fyr in class range 300600-301900 in program 1. The CFTE must also be > 0 or the record type must be 'O' or 'S'. Records are rejected if the SSN starts with a '9' or the account starts with a '4'. Records are selected for the fyr based on the begin and end dates entered and the term being used as shown below. #S-BEG and #S-END are the dates from input.

```
IF #TERM = 'FA1X'
  ACCEPT IF
   (#END >= #S-BEG AND #BEG <= #S-END) AND
   (CFTE GT 0 OR RECORD-TYPE = 'O' OR RECORD-TYPE = 'S')
ELSE
  IF #TERM = 'SP1X'
   ACCEPT IF
   (#BEG >= #S-BEG AND #BEG <= #S-END) AND
   (CFTE GT 0 OR RECORD-TYPE = 'O' OR RECORD-TYPE = 'S')
ELSE
  IF #TERM = 'SP2X'
   ACCEPT IF
```

```
(#END >= #S-BEG AND #BEG <= #S-END) AND
(CFTE GT 0 OR RECORD-TYPE = 'O' OR RECORD-TYPE = 'S')
```

The program tries to pull the name, appointment type and state employee type from RPPB20-PERS-SESSION for the fyr given with record type ='s' (data from the yearly session load). If any one of these values is not found, it pulls all three values from RPPB20-PERS-MASTER. The appointment type is used to determine the category as follows:

```
DECIDE ON FIRST VALUE OF #APPT
  VALUE '20','25','30','35'
    #CAT := '1'        <--TENURE FACULTY
  VALUE '10','15','70','71','72'
    #CAT := '2'        <--NON-TENURE FACULTY
  VALUE '60','61','62','63','75','90'
    #CAT := '3'        <--SUPPLEMENTAL FACULTY
  VALUE '80':'83'
    IF CLASS-CODE = '301056'
      #CAT := '4'      <--GTA (CREDIT BEARING)
    ELSE
      #CAT := '5'      <--GTA (NON-CREDIT BEARING)
  NONE VALUE
    WRITE(0) '** NO CATEGORY **'
          INSTITUTION SOCSEC #APPT #SET
    #CAT := '0'        <--** NON CATEGORIZED **
```

This job also grabs the department description. A file is created with the following information:

INSTITUTION CAMPUS DEPT SOCSEC #NAME #CAT CFTE CAMT
#DEPT-DESCR #SET #APPT CLASS-CODE B-ID RSI RECORD-TYPE SC-FUNDS

The final step in the program is to write out the DEPTXW information for the fyr to a file.

BORDELJF

This SAS program joins the PayPers Fall and Spring records from BORDELPF. It uses RPPB10.HECS.PROD2.BORDEL01.FA1Xyear and RPPB10.HECS.PROD2.BORDEL01.SP1Xyear and creates RPPB10.HECS.PROD2.BORDEL01.FSyear. It creates a report of the Spring records that are not in the Fall based on Inst/SSN. The output consists only of the records that are in both Spring and Fall based on Inst/SSN and the layout of the file is the same as BORDELPF.

BORDELMN

For the Fall run, this SAS program merges the RPPB10.HECS.PROD2.BORDEL01.FSyear PayPers file, RPPB10.campus.PROD2.BORDEL01.FALLyear Colleague file and the RPPB.HECS.PROD2.DEPTXW.FALLyear crosswalk table. For the Spring run, it merges the RPPB10.HECS.PROD2.BORDEL01.SP2Xyear PayPers file, the RPPB10.campus.PROD2.BORDEL01.SPRGyear Colleague file and the RPPB.HECS.PROD2.DEPTXW.FALLyear crosswalk table. It creates the RPPB10.campus.PROD2.BORDELM.NOBUDR file and either RPPB10.campus.PROD2.BORDELM.FALLyear or RPPB10.USD.PROD2.BORDELM.SPRGyear.

It creates a report of the PayPers data sorted by name. It combines the budget records by SSN and Delaware department, totals the CFTE for these records, and creates another report. Next, it takes the file from Datatel and merges it with the DEPTXW table and creates a report. It writes out an error report if the faculty department is not found on the crosswalk table. These records are rejected. Finally the Datatel, budget and DEPTXW information are merged. If a budget record is found without a Datatel record, it is kept only if the category = 5. Datatel records without budget records are rejected and written to an output file. Reports are created as well as a file with the merged data. Two more error reports are created listing budgeted instructors without Datatel sections and Datatel sections budgeted at other institutions.

BORDELNB

This Natural program (BORDELNB) uses the RPPB10.campus.PROD2.BORDELM.NOBUDR file from BORDELMN and creates a report of instructors without budget records. These records should be reviewed to determine why no match was found. It includes all course records for an SSN that are missing budget records. It includes records even if a personnel record is not found. Budget records may exist, but they may not have been picked up because they were in different departments or they do not fit the selection criteria in the PayPerS extract. This Natural step is necessary (could not be done in BORDELMN) because the campuses wanted to see the instructor's name and name is not on the file from Biying. The output is sorted by fund and faculty department.

BORDELAB

For the Fall run, this SAS program uses the RPPB10.HECS.PROD2.BORDEL01.FSyear PayPers file and the RPPB10.campus.PROD2.BORDEL01.FALLyear Colleague file. For the Spring run, it uses the RPPB10.HECS.PROD2.BORDEL01.SP2Xyear PayPers file and the RPPB10.campus.PROD2.BORDEL01.SPRGyear Colleague file. It creates three reports: Merged Faculty and Budget Records by Name, Faculty Without Budget by SSN and Budget Without Faculty by Name. Hopefully these report will help campuses verify that department numbers were assigned correctly in PayPers and Colleague. If a person appears on the BORDELNB report, the campuses can check for records for that same person on the BORDELAB reports. They may be in another department or were just not extracted for some other reason. The budget records can be reviewed online as well on the BQES screen.

BORDELTB

This SAS program reads the merged file from BORDELM:
RPPB10.USD.PROD2.BORDELM.FALLyear or

RPPB10.campus.PROD2.BORDELM.SPRGyear and creates a final report and file RPPB10.campus.PROD2.FALLyear.COSTDOWN or RPPB10.campus.PROD2.SPRGyear.COSTDOWN. It sorts the data by campus and splits the information into the columns needed for Delaware. It creates an error report of method or level problems (METH = 0 or LVL = 0 and the CAT ne '5'). It creates a final file which can be downloaded into excel. A couple coding lines to note are:

```
A_CRED = CREDITS * (PCT_RESP / 100);
A_SECT =  (PCT_RESP / 100) * SECTVAL;
```

The output file contains the following information:

```
@1   NAME        $CHAR20.
@21  SOCSEC      $CHAR11.
@32  DEL_DEPT    $CHAR05.
@37  DEL_DDSC    $CHAR35.
@72  SECT        $CHAR06.
@84  PSECT       $CHAR06.
@90  SUBJ        $CHAR04.
@94  CRSENUM     $CHAR04.
@98  SECTTYP     $CHAR01.
@99  CREDITS      7.2
@106 A_CRED       7.2
@113 A_SECT       7.2
@120 COL_D        7.2
@127 COL_E        7.2
@134 COL_F        7.2
@141 COL_H        7.2
@148 COL_I        7.2
@155 COL_L        7.2
@162 COL_M        7.2
@169 COL_N        7.2
@176 COL_O        7.2
@183 TOTDFTE      4.3
@187 A_FTE        6.5
@193 BID         $CHAR04.
@197 CATEGORY    $CHAR20.;
```

Healthcare Program Reporting

Responsibility:
Timeframe:

Healthcare Enrollments Analysis, Fall 2004 (end of term)
Worksheet "rpt" provides the Report
Worksheet "specs" provides the Specifications
This is a new report. Review specifications before making decisions.

<u>The report provides information on three groups of students:</u>
1) Enrolled in a healthcare degree program (Medicine, Nursing, Physical Therapy, Respiratory Care, etc)
2) Intend to enroll in undergraduate program (pre-nursing, pre-dental hygiene, pre-medical technology)
3) Intend to enroll in post-bachelor's program (pre-medicine, pre-dentistry, pre-optometry, pre-physical therapy, etc)
This is a duplicated count. Someone seeking a nursing degree AND identified as pre-dentistry is included in both rows.

The report provides information on ACT scores, credit hours enrolled, high school graduation year, residency, gender, and Native American ethnicity. **Information about post-college plans (pre-medicine, pre-dentistry, etc) reflects what was in the student information system at the end of fall 2004. Additional students may have been considering these careers or planning to apply for admission to professional schools.** Report information is listed below.

<u>Healthcare Enrollments Analysis - Report Format</u>

All Pages - These columns print on all pages
Description - from system OR specific for this report
Note: For space & readability standard labels were used in place of university descriptions for "pre-" majors.
For example, four different descriptions in the system all appear in the report as "Pre-Dentistry."
Univ - University B, D, N, M, S, U
Degree Type - First professional, Master's, Bachelor's, Associate
N - number of students (A few students are in more than one row.)

Odd Pages (1, 3, 5) - Percentages of Students in the Row & Number of Native Americans
% ACT 24-36 - percent with ACT from 24 to 36 (undergraduates only)
% 15 Cr Hrs - percent enrolled for 15 or more credit hours
Note: End of term data; not consistent with earlier reports prepared with census date extract.
% ACT + Hours - percent with ACT 24-36 AND enrolled for 15 or more credit hours (undergraduates only)
% HS 00-04 - percent with HS graduation years 2000 through 2004

% SD - percent with SD residency status
% Women - percent who are women
N NatAm - Number who are Native American

Even Pages (2, 4, 6) - NUMBERS of students: ACT, Credit Hours, Gender & Residenc
ACT, Credit Hours, ACT + Hours
SD Women, SD Men, SD Total
Other Women, Other Men, Other Total

Additional Columns to Left - change formatting to print
Program, CIP, Major

These are highest priority - should be possible to find students with these interests even if they have a major; should be changeable when students decide to change;
NODEG.P-MED Preparator Pre-Medicine [usually post-bachelor's; First professional doctoral degree]
NODEG.P-DEN Preparator Pre-Dentistry [usually post-bachelor's; First professional doctoral degree]
NODEG.P-OPT Preparator Pre-Optometry [usually post-bachelor's; First professional doctoral degree]
NODEG.P-POD Preparator Pre-Podiatric Medicine [usually post-bachelor's; First professional doctoral degree]
NODEG.P-PT Preparator Pre-Physical Therapy [usually post-bachelor's; First professional doctoral degree]
NODEG.P-OT Preparator Pre-Occupational Therapy [post-bachelor's; master's degree]
NODEG.P-PA Preparator Pre-Physicians Assistant [include, now a master's degree at USD and other places]

Lower priority but treat the same way
NODEG.P-CHI Preparator Pre-Chiropractic [may not require bachelor's but treat the same way for tracking]
Public Health [post-bachelor's masters/doctoral programs - allow tracking]
Veterinary Medicine [usually post-bachelor's; First professional doctoral degree]

Undergraduate programs - not what current project is about -- no change from current
NODEG.P-MT Preparator Pre-Medical Technology [not in same group - this is a bachelor's program]
NODEG.P-RES Preparator Pre-Respiratory Therapy [not in same group - this is an associate program]
NODEG.P-DNH Preparator Pre-Dental Hygiene [not in same group - this is an associate program]

I have no information, no programs in system, probably allow tracking
NODEG.P-MOR Preparator Pre-Mortuary Science

National Student Loan Clearinghouse Setup

Responsibility: University
Timeframe: 4 enrollment reports for Fall, 3 enrollment reports for Spring, 1 enrollment report for Summer; 1 graduation report per semester

Complete the following steps to set up Colleague to report to the National Student Clearinghouse - Note that this is a high-level procedure and that detailed instructions for completing many of these steps are provided in subsequent sections.

Step 1 - Register your institution with the National Student Clearinghouse in Herndon, Virginia.

- The NSC will give you information you need, such as a school code and a branch code.

Step 2 - Define required codes.

- Use the Academic Levels (ACLV) screen to define the number of credits necessary for full and half time status.
- Use the Hiatus Codes (HIAT) screen to define your hiatus codes.
- Use the Withdrawal Reason Codes (WTHR) screen to define withdrawal reasons codes.
- See “Defining Hiatus Codes and Withdrawal Reasons” at www.datatel.com for more information about defining these codes.

Step 3 - Make sure these codes (hiatus, and withdrawal reasons) are applied to students’ records appropriately.

- Use the following screens to apply these codes to students’ records:
    - The Student Hiatus Summary (SHIS) screen
    - The Student Hiatus (STHI) screen
- See “Assigning Hiatus Codes” at www.datatel.com for more information about applying these codes to students’ records. See Withdrawing Students for procedures on withdraws.

Step 4 - Define the translation of these codes.

- Use the NSC Hiatus Code Translate (SITT) and the NSC Hiatus Reasons Translate (SIPT) screens to define which Colleague codes the extraction process should use to mean the required predefined NSC codes.
- In the Withdrawn field, enter W, S, N & M

Defining Your NSC Reporting Parameters

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Note: The SITX creates one work file. The universities will need to coordinate the timing of creating/updating/sending their university Clearinghouse reports. Deadline dates should be staggered among the universities.

Note: STU.MISC1 will be deleted and re-populated with the batch program each semester before the 1st submission.

Complete the following steps to define your reporting parameters:

Step 1 - Access the NSC Parameter Definition (SITS) screen.

- The NSC Parameter Definition (SITS) screen is displayed.
- The old report must be purged on SIPG first before this information can be changed for the new semester reporting.

Step 2 - In the School Code field, enter the code you received from the NSC.

- Enter the Department of Education Interagency Commission on Education (FICE) code provided by the National Student Clearinghouse.

Step 3 - In the Branch Code field, enter the code you received from the NSC.

- Enter the branch code assigned to your institution by the National Student Clearinghouse.

Step 4 - In the Academic Term field, enter the term on which you are reporting.

- This field is free form text and is NOT validated.
  - Enter 2003FA, 2004SP, 2004SU, etc
- This description will appear on the report submitted to the National Student Clearinghouse.

Step 5 – In the Report Voluntary Data field,

Enter [Yes] in this field to use the voluntary submission option to submit both the basic and voluntary information to the NSC.

- Student Load Rules
  - DSU wrote rules for separating FT from PT that can be used.
- Student Anticipated Grad Date Rules
  - Will not be used by SD. SD will let the Anticipated Grad Date from Colleague default in.
- Good Student Discount Rules
  - Will not be used by SD.

Enter [No] in this field to use the standard submission option to submit only the basic information to the NSC.

The voluntary information is not required data for the NSC report.

Note: This field cannot be changed after running the NSC Student Data Extraction (SITX) process. All the extracted data will have to be purged using the NSLC Purge Process (SIPG) form.

Step 6 - In the Standard Report Flag field, enter either:

- **Y** if the term on which you are reporting is a standard, compulsory term (such as a regular fall or spring term)
- **N** if the term on which you are reporting is a nonstandard term (such as graduation)

Step 7 - In the Reporting Level field, enter F to report on all students for the defined term.

Step 8 - In the Data Block Indicator (Privacy) field, enter the privacy code(s) which will protect a student's enrollment information from being included in Enrollment Search reports.

Step 9 - In the Data Block Indicator (Directory) field, enter the directory code(s) which will protect a student's enrollment information from being included in Enrollment Search reports.

- Enter N

Step 10 - In the Reporting Period fields, enter the dates to include in this report.

- The dates should reflect the term specified in the Academic Term field
  - For example, if you enter "2003FA" in the Academic Term field, the dates you enter in the Reporting Period fields the Fall term dates, such as 09/03/03 and 12/19/03.
  - These dates will be used by other screens throughout the reporting process.
- The reporting period dates and the census date may not be changed once the enrollment data is generated. If you need to start over or you are reporting for a different term, run SIPG first.

Step 11 - In the Census Date/Previous Census Date field, enter the date that determines the status to be reported.

- Use the NSLC submission deadline dates determined for reporting
  - Update each time the extract is run for enrollment in Fall and Spring
- Use the end of term for summer census date.
- Only enter the current census date in both the "Current Census Date" and "Previous Census Date" field if this is the first submission in a term. If this is not the first submission in a term, then users should enter the current census date in the "Current Census Date" field, and enter the previous census date in the "Previous Census Date" field.

- Use the day before the last day of the term for graduation.

Step 12 – Update the SITS screen.

Translating Hiatus Codes on NSC

Responsibility: University

Complete the following steps to translate your institution's hiatus codes:

Step 1 - Access the NSC Hiatus Codes Translate (SITT) screen.

Step 2 - Enter the hiatus codes in the withdrawn field

- M Military Activation
- W Withdrawal
- S Suspended
- N National Student Ex

Step 3 – Update the SITT screen.

Translating Withdrawal Reasons on NSC

Responsibility: University

Complete the following steps to translate your institution's withdrawal reasons:

Step 1 - Access the NSC Hiatus Reasons Translate (SIPT) screen.

Step 2 - Enter the hiatus codes in the withdrawn field

- M Military Activation
- W Withdrawal
- S Suspended
- N National Student Ex

Step 3 – Update the SIPT screen.

Revised 9/28/04

Extracting Student Information for NSC Reporting

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Follow these steps to initiate the process to extract student information for reporting purposes:

Graduate Processing

Step 1 - Run XD.MAH.FA.CH.GRAD.REG.SELECT from the colon prompt.

- This paragraph creates a savedlist of all students with ACAD CREDENTIAL records for a particular date and institution ID. This savedlist, named XH.FA.CH.GRAD.SELECT.xxx where xxx is the university, will be used as input to the SITX process. Remember to exclude completed Certificates.

  Enter these parameters:

  Enter Term1: 2004SU
  Enter Term2: 2004FA
  Enter Term3: 2005SP

  Enter Location: (BHSU, DSU, SDSMT, NSU, SDSU, USD)

  Enter Date MM/YY 05/04: 05/04
  Enter Institution ID: 1102022 (See below for the table by university)

BHSU	1102017
DSU	1102022
NSU	1102027
SDSMT	1102031
SDSU	1102032
USD	1102035

Step 2 - Review the 5 or More Credit hour Report.

- This paragraph also creates a report of students that graduated from your university that are enrolled in 5 or more credits at your university for a future term. These students are included in the savedlist created above. If you DO NOT want to include these students in the graduates CH submission, either remove them from the savedlist or delete them from the CH using SITC after SITX has been run.

Step 3 - In the Name and Address Hierarchy field, enter the name and address hierarchy you want to use when running this extraction process.

- The name and address hierarchy must be defined previously.
- For example, enter Preferred and/or Home

Step 4 – In the Email Hierarchy field,

- Enter x.NSC where x is your university

Step 5 - Enter the savedlist name XH.FA.CH.GRAD.SELECT.xxx

- You should no longer need to use the additional selection criteria for the graduates CH process.

Step 6 - In the Terms field, enter the academic terms on which you want to report.

- Enter the term you are reporting for
- For example 2003FA

Step 7 - In the Academic Level field, enter the academic levels on which you want to report.

- Enter UG, GR

Step 8 - In the Full-Time Hours and Half-Time Hours fields, enter the number of hours the system requires for full-time and half-time status respectively.

- Colleague uses these values in place of the full/half time hours designated for an academic level on the ACLV screen if a given student being evaluated by the batch process has multiple student academic credits in multiple academic levels.
- Enter 12 & 6

Step 9 - Update the SITX screen.

- The Additional Selection Criteria screen is displayed.

Note: The graduate process pulls the full-time/Part-time status instead of 'G' graduated because of PID2. Each university will need to contact RIS after the SITE process has reached a "Verified" Status (after all errors fixed and students that need to be added manually are added) but before running SITP. RIS will update the statuses electronically to G.

<u>Enrollment Reporting</u>

Step 1 - Access the NSC Student Data Extraction (SITX) screen.

- The NSC Student Data Extraction (SITX) screen is displayed.

Note: The home institution will report the student, using all their system credits to determine load.

Step 2 - In the Name and Address Hierarchy field, enter the name and address hierarchy you want to use when running this extraction process.

- The name and address hierarchy must be defined previously.
- For example, enter Preferred and/or Home

Step 3 – In the Email Hierarchy field,

- Enter x.NSC where x is your university

Step 4 – Enter a Saved List Name, if applicable

- An example of a saved list for summer enrollment reporting could be:
  SELECT STUDENT.ACAD.CRED WITH STC.TERM = <<Enter Term: >>
  SELECT STUDENT.ACAD.CRED REQUIRE.SELECT WITH XD.STC.STU.MISC1 = 'x' (where x is your university identifier)
  SELECT STUDENT.ACAD.CRED REQUIRE.SELECT WITH XU.STC.SSN LIKE '...-...'
  SELECT STUDENT.ACAD.CRED REQUIRE.SELECT WITH STC.CURRENT.STATUS = 'N' 'A' 'W'
  SELECT STUDENT.ACAD.CRED SAVING UNIQUE STC.PERSON.ID

Step 5 - In the Terms field, enter the academic terms on which you want to report.
- Enter the term you are reporting for
- For example 2003FA

Step 6 - In the Academic Level field, enter the academic levels on which you want to report.
- Enter UG, GR

Step 7 - In the Full-Time Hours and Half-Time Hours fields, enter the number of hours the system requires for full-time and half-time status respectively.
- Colleague uses these values in place of the full/half time hours designated for an academic level on the ACLV screen if a given student being evaluated by the batch process has multiple student academic credits in multiple academic levels.
- Enter 12 & 6

Step 8 - Update the SITX screen.
- The Additional Selection Criteria screen is displayed.

Step 9 - Enter Y in the Additional Selection Criteria field
- For Enrollment reporting:
  - Enter WITH STU.MISC1 EQ ‘x’
    - Where x is your institution
  - AND STU.SSN LIKE ‘…-…’
- Save the information on this screen.
- The Sort Definition screen is displayed.

Note: The early submission report to Clearinghouse will need to be run using a saved list of students with your Home University or a saved list of students with registrations at your university. STU.MISC1 will not be populated by the early submission dates.

Step 10 - Enter any sort criteria you need
- Save the information on this screen.
- The NSC Analytical Report Peripheral screen is displayed.

Step 11 - Complete the peripheral screen as needed
- Enter H for a HOLD file

- Save the information.
- The Phantom Mode Specification screen is displayed.

Step 12 - If you want this process to run in the background (in phantom mode), complete the Phantom Mode Specification screen;

- Otherwise, leave this screen blank.

Step 13 - Update the screen to start the process.

- The extraction process begins and the report is sent to a hold file or the printer, depending on how you completed the NSC Analytical Report Peripheral screen in Step 9 - The Status of the information is marked as "Generated."

Step 14 – Review the error report generated from the extract

An error report is generated from this process. Several messages may occur. If the extract generated many errors or was run in correctly, fix the necessary parameters and rerun. Students listed on the error report are not included in the extract until they are manually entered on SITC. Refer to the SITC section for adding or updating records. If errors are fixed in Colleague, the SITX process must be run again to extract these changes.

- **The student does not have an active Academic level for Census date:**
  This message is generated when a student has registrations (active or inactive) and there is not an active student program. If the course registrations are active, A or N, a program and corresponding level must be activated. If all of the course registration statuses are 'X', 'C' or 'D', then the inactive program and level are OK and the student should not be included in the extract.

- **The student has no courses and has no active hiatus:**
  This message is generated when all of the course registration statuses are 'X', 'D' or 'C'. The program may or may not be active. This student should not be included in the extract.

- **The student does not have any valid courses in an academic level in which they are active:**
  This message means that the level of one or more of the courses does not match the level of the student. Check each registration on the STAC → SACD → SPSH screen.

- **End date status could not be determined.**
  This message is generated when a student is enrolled in a 0 credit hour course, such as applied music. The student could also be auditing the course and should not be included. Check all of these. These students should not be included in the extract.

Step 15 – Determine students without a STU.MISC1 that have a Home Location of your university

SELECT STUDENTS WITH STU.TERMS = '2004FA'
SELECT STUDENTS WITH STU.CURRENT.HOME.LOCATION = 'DSU'
SELECT STUDENTS WITH STU.MISC1 EQ ' ' "
SELECT STUDENTS WITH XD.STU.ACTIVE.CRED GT ' ' " 0.00
LIST STUDENTS XU.STU.IR.NAME STU.TERMS
STU.CURRENT.HOME.LOCATION STU.MISC1
These students should be added via SITC

Correcting NSC Extracted Information

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Follow these steps to correct extracted student information:

Step 1 - Access the NSC Data Correction (SITC) screen.

- The NSL Data Correction screen is displayed.

Step 2 - Enter the ID of the student whose information you want changed in the LR.STD.ENR file.

- The student information is displayed.

Step 3 - Complete the SITC screen, changing the information about the student as needed.

- Most of this information is created with the extract (SITX)
- If you have to create a new record, enter the SSN, then A to add
  - If the enrollment status is H or above, an Ant Graduation Date is required.
  - Ant Graduation Date must be equal to or later than the term end date.
- If you have to delete a record, Control F10 twice.
  - If the student does not have a SSN, they cannot be reported.
- Update a new status and status start date
  - For example, if a student audits a class, the status start date would be the date of the audit
  - The status is G when running the graduate process

Step 4 - Save the information.

- The Status of the information is marked as "Modified."

Step 5 - Repeat this procedure beginning with Step 2 for each student record you want to modify.

Generating the NSC Analytical Report

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Follow these steps to generate the analytical report on the extracted student information:

Step 1 - Access the NSC Analytical Report (SIIR) screen.

- The NSC Analytical Report (SIIR) screen is displayed.

Step 2 - Enter the name of the saved list that contains the extracted student information you want to analyze.

- This saved list must contain IDs from the LR.STD.ENR file.

Step 3 - Enter the enrollment statuses you want included in the report.

- Students with these statuses applied to them will be included in the report.
- If you leave this field blank, all enrollment statuses will be included in the report.
  Enrollment Processing:
  - Leave blank to retrieve all enrollment statuses. Enter ‘W’ to list students with a withdrawn status to verify that all withdrawn students were selected.

  Graduate Processing:
  - Leave blank, as the ‘G’ status records are all that should be in the file.

Step 4 - If you want to include only certain students in the analytical report, enter the student IDs in the Students Included field.

Step 5 - If you want to exclude certain students in the analytical report, enter the student IDs in the Students Excluded field.

Step 6 - Update the SIIR screen.

- The Additional Selection Criteria screen is displayed.

Step 7 - Enter any other selection criteria you need

- Save the information on this screen.
- The Sort Definition screen is displayed.

Step 8 - Enter any sort criteria you need

- Sort by LSE.LAST and LSE.FIRST
- Save the information on this screen.
- The NSC Analytical Report Peripheral screen is displayed.

Step 9 - Complete the peripheral screen as needed

- Save to a HOLD file
- Save the information.
- The Phantom Mode Specification screen is displayed.

Step 10 - If you want this process to run in the background (in phantom mode), complete the Phantom Mode Specification screen;

- Otherwise, leave this screen blank.

Step 11 - Update the screen to start the process.

Step 12 – Review the Analytical Reports

Enrollment Processing: Verify withdrawn and multi-institutional students.

Graduate Processing: During the graduation process, the student program status will have been set to a 'G' on SPRO. This status is the status printed for this report. If one of the graduate records does not have a 'G' status, check the SPRO screen and correct as needed.

In order for this process to work correctly, all the graduation records must have a status date one day prior to the end of the semester. This is done on SBRD as part of the graduation process as well as on the SPRO screen. The graduation status date is retrieved from either the SPRO screen or from the End Date field on AACR.

Sometimes when a student has two degrees awarded, the student does not get selected using the additional selection criteria. These students should be identified and the SITC should be changed, added, or deleted as needed.

The Financial Aid Directors asked that students enrolled at least half-time in a future term be excluded from the graduation submission. Follow these steps to generate a report.

- At the colon prompt, type CLRGGENR
- Enter the 7 digit Institution ID: 8008811
- Enter the degree date in quotes: '05/02'
- Enter a reporting term in quotes: '2002SP'
- Enter the UG level in quotes: 'UG'
- Enter the GR level in quotes: 'GR'

Verifying NSC Extracted Information

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Note: The control status of the extracted information must be either '**Generated"** or **"Modified"** before the information can be verified using the SITE process. If the SITE process finds any errors, the control status of the information is changed to **"Error Detected".** If the SITE process finds no errors, the control status is changed to **"Verified".**

Follow these steps to verify student information in the LR.STD.ENR file:

Step 1 - Access the NSC Verification Report (SITE) screen.

- The NSC Verification Report screen is displayed.

Step 2 - Do you really want to proceed with the verification process?

- Enter Y if you want to continue with the verification process.
    - If you enter **Y**, Colleague begins the verification process and generates the report:
- Enter **N** if you entered this screen by error or have decided NOT to run the verification report.
    - If you enter **N**, Colleague aborts the process.

Step 3 - Analyze the verification report

- If you discover errors, correct them.
- If there are any discrepancies in the generated information, the errors will appear on the verifications report and the status of the information is changed to **"Error Detected"**. Use the SITC screen to make corrections to the incorrect information.
    - Anticipated Graduation Date (AGD): Correct the date based on program information on the SPRO screen. Also correct the SPRO screen so that the next time the processes are run, the ADG is extracted correctly.
    - Missing SSN: Frequently, foreign students do not have SSN's. If a SSN cannot be found, the record is deleted.
    - Missing State: Occasionally, foreign students will not have a preferred address causing the state field to be blank. In this case, update the state to foreign, 'FO'.
    - Run the SIIR report again to pick up any changes made on SITC.

Step 4 – After all corrections have been made, run the SITE process again.

Note: The graduate process pulls the full-time/Part-time status instead of 'G' graduated because of PID2. Each university will need to contact RIS after the SITE process has reached a "Verified" Status (after all errors fixed and students that need to be added manually are added) but before running SITP. RIS will update the statuses electronically to G.

- If no errors are found, run the SITP.

- See Creating a NSC Hold File for Submission for procedures.

Creating a NSC Hold File for Submission

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Note: SITP is a shared file, meaning BHSU writes to it first, then DSU, etc. The file assumes the permissions of the first person writing to it. If the next person doesn't have that university group on their ID, then they can't access the file and the process doesn't work.

There are two way to resolve it – give the end user the other university groups so no matter who wrote to the file first, they can access it. Or, contact RIS before starting and we can change the permissions on the file so it can be accessed.

Follow these steps to create a hold file to submit to the National Student Clearinghouse:

Step 1 - Make sure that your external label includes:

- Your institution code
- Your institution name
- The date of the last verification (Verified) status
- See "Defining Your Reporting Parameters" for more information about setting up your label.

Step 2 - Access the NSC Tape Processing (SITP) screen.

- The NSC Tape Processing screen is displayed.
    - SITE needs to be run with no errors before you can run this.
    - SITE needs to be run after SITC has been updated, if need be.

Step 3 - In the Hold File enter:

- **H** to produce only a hold file with the extracted information
- If you print this report, it will be in SSN order. Another option is to run the SIIR report generated as part of the analysis step as this report can be sorted by name. The SIIR report can be run at any time after the initial extract has been run.

Step 4 – Update the SITP screen

Step 5 – Send the SITP file to NSLC through FTP

- Copy the SITP file to the XH.FTP.DIR in preparation for file transfer using the following command at the colon prompt.
    - COPY FROM _HOLD_ TO XH.FTP.DIR SITP OVERWRITING
- Open ftpprd.state.sd.us
    - Get SITP
    - Change SITP to FICE code.clr
    - For example, 00347100.clr
- Open ftp.nslc.org
    - Put FICE code.clr

- Make a backup copy

Reporting to the National Student Clearinghouse

Responsibility: University
Timeframe: Sept 3, Nov 14, Dec 19, 2003 for enrollment; Jan 23, 2004 for Fall graduation; Feb 6, Mar 18, May 7, 2004 for enrollment; June 25, 2004 for Spring Graduation; Aug 25, 2004 for enrollment; Sept 13 for Summer graduation

Complete the following steps to submit student information to the National Student Clearinghouse - Note that this is a high-level procedure and that detailed instructions for completing many of these steps are provided in subsequent sections.

Note: Perform all of the steps listed below in the same account - If you perform some of these steps in one account and some in another account, you will encounter errors and obtain unpredictable results.

Step 1 - Complete the necessary setup before beginning to report to the National Student Clearinghouse.

- See “NSC Setup” for more information about setting up your institution for NSC reporting.

Step 2 - Make sure the LR.STD.ENR file is empty.

- Use the NSC Purge Process (SIPG) screen to purge the LR.STD.ENR - file.
- See “Purging NSC Information” for more information about purging the LR.STD.ENR file

Step 3 - Define the NSC reporting parameters for this report.

- Use the NSC Parameter Definition (SITS) screen to define your parameters, such as your school code and reporting period dates.
- See “Defining Your NSC Reporting Parameters” for more information about defining NSC parameters.

Step 4 - Extract the student information you want to report to the NSC.

- Use the NSC Student Data Extraction (SITX) screen to extract the data from Colleague.
- See “Extracting Student Information for Reporting” for more information about extracting this information from Colleague.

Step 5 - Analyze the information.

- Use the NSC Analytical Report (SIIR) screen to analyze the extracted information.
- See “Generating the NSC Analytical Report” for more information about analyzing the extracted information.

Step 6 - If you find any errors in the SIIR report, correct them.

- Use the NSC Data Correction (SITC) screen.

- See "Correcting NSC Extracted Information" for more information about correcting errors in the extracted data.

Step 7 - If you need to start again, repeat this procedure beginning with Step 2.

- It is always necessary to purge the file of old data before trying to extract new semester data.

Step 8 - Verify the extracted information is correct.

- Use the NSC Verification Report (SITE) screen.
- See "Verifying NSC Extracted Information" for more information about running this report.

Step 9 - Create a hold file with the extracted information to submit to the National Student Clearinghouse.

- Use the NSC Tape Processing (SITP) screen.
- See "Creating a NSC Hold File for Submission" for more information about creating this file for the NSC.

Purging NSC Information

Responsibility: University
Timeframe: Prior to Clearinghouse reporting

Note: The extracted file needs to be purged before you can re-set the parameters on SITS. To generate or extract additional students for the same reporting period or census date as specified on the SITS screen, it is not necessary to run the SIPG purge process. The SITX process automatically clears the LR.STD.ENR file prior to extracting student information.

Follow these steps to purge student information from the LR.STD.ENR file:

Step 1 - Access the NSC Purge Process (SIPG) screen.

- The NSC Purge Process screen is displayed.

Step 2 - Do you want to purge the LR.STD.ENR file?

- Enter **Y** if you want to continue with the purge process.
    - If you enter **Y**, Colleague:
        - Deletes the LR.STD.ENR file
        - Sets the control status to null
- Enter **N** if you entered this screen by error or have decided NOT to purge the file.
    - If you enter **N**, Colleague displays the message: “Purge process cancelled at user’s request.”

Step 3 – Update the SIPG screen

Using National Degree Verification Service

Responsibility: University

Note: The export file from the previous NDVS process should be deleted before running the NDVS process again - If you do not delete the old file, errors could occur in the new file - See your System Admin for information about deleting files in Colleague.

Step 1 - Access the Deg/CCD Student Export (NDVS) screen

Step 2 - Enter a Batch Control ID number

- Use the Batch Control ID LookUp to enter an ID or to create a new ID
- Enter Y/N to Update Mode
  - N will generate a report

Step 3 – To have the reports sent to a hold file, detail on Modify Target File Definition

- Change the OS File Name
- Because there is only one HOLD file report, the universities must use a Banner name specific to their university or the next time NDVS is run, the HOLD file will be wiped out
- The HOLD file naming convention is Xx.fml.filename (where x is the university identifier and fml is the first, middle & last initial of the operator)

Step 4 - Enter in your institution ID or name

- Use the Institution LookUp to enter an institution ID and name
  - A FICE code is automatically entered for you based on your institution.
- Enter the two digit FICE Branch Code

Step 5 - Enter any additional selection criteria

- Enter any Financial Block Restriction you wish NDVS to know about
  - Entering a code in this field will allow Colleague to check for students who have this Financial Block associated with them. If a student has one of the Financial codes in this list associated with them, their degree and/or CCD information will still be reported. However, information will be sent as well letting NDVS know that this student has a Financial Block on them.
- Enter appropriate Directory Codes
  - Directory codes entered here will be used to determine whether a student's enrollment information can be included in Enrollment Search reports issued by the NSLC.
  - If any of the codes entered in this field match any of the codes entered for a student on the Biographic Information (BIO) screen then information is sent to NDVS depicting that this student should not be included in Enrollment Search reports.
- Enter the Degree Period, if desired

- This text is for informational purposes only. Individual degree award dates are indicated for each graduate.

- Saved List Name
  - You can use a saved list of ACAD.CREDENTIALS IDs as the initial selection criteria for running this export.
  - If you use a saved list, Colleague generates the export for all the students that are in the save list. If you enter any other selection criteria Colleague will export only those students who meet all the criteria entered on the screen.

  Note: To avoid processing the entire ACAD.CREDENTIALS file, you should always specify either a saved list, selection criteria, or specific academic credentials.
- Institutions
  - If your institution consists of multiple institutions you can report all of the institutions or only select institutions. To report all of the institutions enter all the institution IDs or names. To report only select institutions then enter in only those institutions IDs or names you wish to include for NDVS. Leaving this field blank selects all graduates regardless of their institution ID.

Step 6 - Enter the appropriate credential start and end dates

- If you are running a history you can use the dates that Colleague defaults to, otherwise enter dates that list only the most recent graduates.

Step 7 - Update the NDVS screen

- The Change Peripheral Defaults screen in displayed

Step 8 - If you want this process to run at a later time, complete the Phantom Mode Specification screen;

- Other wise leave this screen blank.

Step 9 - Verify information from the audit report generated by the NDVS process.

- If any of the data is incorrect on the Error Report, correct that data, then repeat this process beginning with Step 1

Note: If required fields are listed as null on the Error Report then the record is not listed on the export file. Correct this data and then repeat the NDVS process to include those graduates. If all the data is correct continue to Step 10

Step 10 - Transmit "flat" file to the National Degree Verification Service

- See your System Admin for more information about transmitting information to the National Student Clearinghouse.