Student Information Systems

BHSU

DAKOTA STATE **dsu** **UNIVERSITY**

Using the COD Interface Module

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Procedure Manual

YOUR FUTURE IS HERE. South Dakota Board of Regents

South Dakota Colleague System Procedures

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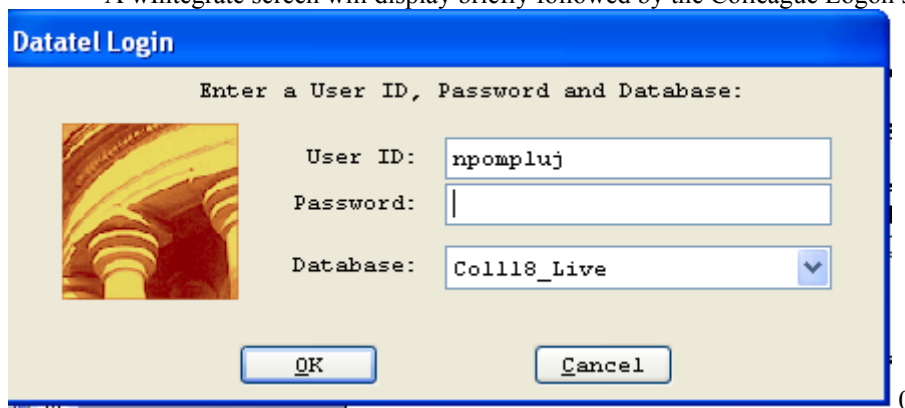
Colleague Access

Accessing Colleague from Windows

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

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

Logging On/Off & Changing Password

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

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

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

  Click on OK.

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Change Password

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

  or

- Select the desktop **Datatel Terminal** icon.

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

```
    Main Menu

    1.   Live Account
    2.   Change Password
    3.   Log Off

    Enter your selection[1-10]: 2

    Changing password for "userid"
    userid's Old password:
    userid's New password:
    Enter the new password again:
```

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

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

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Rules for passwords are:

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

Password Change Requirements

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

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

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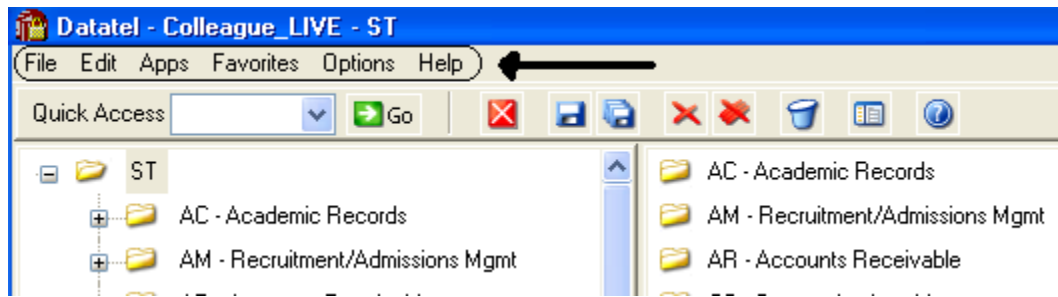
To start a new session, click on **File**, then **New Session**, then **Current Account** to stay in the same account (Live or Test) or **New Account** to open a session in the opposite account.

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

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

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

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

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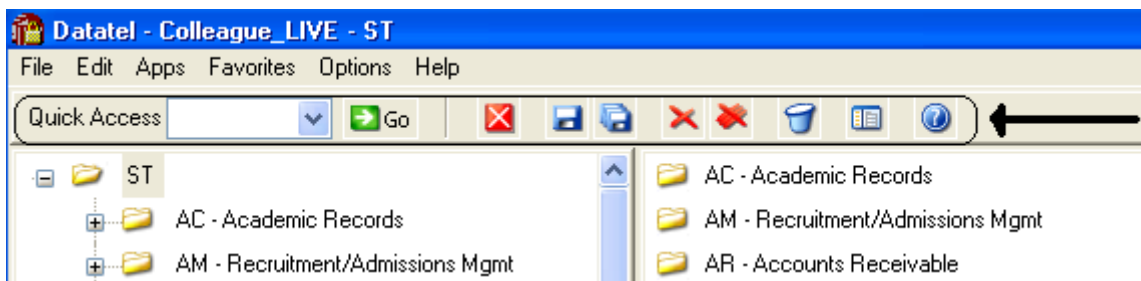
If you know the name of the screen you want to access, type in the mnemonic in the **Quick Access** box and click **Go.** The drop down box in the Quick Access box will contain the mnemonics you have used previously.

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

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

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

Menu

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

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

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

<u>**Detail Screens**</u>

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

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

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

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

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

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

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

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

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

<u>Date and Time Stamp</u>

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

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To view a report

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

Function keys

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

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

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

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

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

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

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

> **Shift F9 →FINISH** same as F9

QUICK TIPS

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

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Search Procedures

Student searches may be completed in several ways:
- Student Social Security Number
- Student Colleague ID
- Exact Student Name
- Student Name by Sound

Student Social Security Number Search

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

Student Colleague ID Search

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

Name Search

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

Exact Name Search

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

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

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

Phonetic Name Search

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

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

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

Other Searches

<u>Course or Section Search</u>

Enter XXXX-000-00
    Where: XXXX is the prefix for the course   (i.e.: BIOL)
        000 is the course number (i.e: 101)
        00 is the section number with the university identifier(i.e.:x 01)
    Example: BIOL-101-D01
If the section number is not provided, a resolution screen will be displayed for the selection of the correct section.

<u>Term Search</u>

  Enter YYYYTT (i.e.: 1998FA)
    Where: YYYY is the year in which the term actually occurs (i.e.: 1998)
        TT is the term
        (i.e. FA = Fall , SP = Spring, SU = Summer)

<u>Restricted lookup by Topic Code</u>

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

<u>Restricted lookup for open sections</u>

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

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Record Search Overview
Responsibility: University

LookUp Selection Options

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

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

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

Valid operands are:

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

Record Lookup

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

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can later change his address, phone number, birth date or even his social security number but you can't delete Bob Smith's record. The following are steps, or procedures, for searching records:

Person/Organization Lookup

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

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

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

   IF YOU HAVE NO MATCH:

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

IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

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

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

   ** POINTS TO REMEMBER **

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

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

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

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

   RECOMMENDATION: Leave the "Preferred Name" as it appears after entry in the Last, First, Middle fields and enter the other name in the "Nickname" field on the Biographic Information (BIO) screen. *This screen can be accessed by detailing on the Last, First, Middle name field on NAE.*

Other Records Lookup

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

1. **Enter a partial lookup -** Once again this option will bring back additional records that will require you to look through more resolution items but it helps ensure that the record you wish to enter doesn't exist in a similar form. On some lookup screens you may be required to enter complete pieces such as with courses (on CRSE you need to enter the full subject name ie., ENGL).

2. **Use (…) as a wild card lookup** – Looking for a group of records that fit a specific criteria can be done by using … For example, looking up a GL number with the numbers "1150" in the middle you can type …1150… at the lookup prompt. Only those numbers with 1150 will appear on the resolution screen. This applies as well by typing … at the beginning or at the end of the lookup. For example, in searching for positions that end in ADJ you would type …ADJ or searching for all departments that begin like EN you would type EN…

Individual and Corporation Record Relationship

CAUTION

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

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

- Click OK to release the warning message.
- Cancel out of the screen without making any changes by clicking on the single or triple X, clicking on File and Cancel or using Shift -> F8 and hit Enter.
- If you want to access the record, go to ORGP (corporations) or NAE (individuals).

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

Flagging records on a resolution screen

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

Using a savedlist to process large numbers of records

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

Revisions approved through Module Groups → UDA → SDA

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Steps for Setting Up the FA Module for COD
Responsibility: **RIS**

The process of setting up COD-related FA codes and parameters is comprised of a number of steps. Table 2-10 lists the steps in setting up the FA module to use the FA COD interface, along with a reference to where you can find more information about that step.

Note: Perform the first step only if you expect a significant lag between the time you load the COD Interface software and the time you will begin using the interface.

1. Populate the Routing ID validation code tables. "Setting Up Routing ID Validation Codes".
2. Assign Routing IDs to your FA offices. "Assigning Routing IDs to FA Offices".
3. Set up your COD Parameters. "Setting Up COD Parameters".
4. Create DMI Users for running the import process. "Creating DMI Users for Running the Import Process".

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Setting Up Routing ID Validation Codes
Responsibility: **RIS**

Before you can continue with this procedure, you must obtain your Routing ID(s) from the Department of Education.

Step 1 - Access Colleague's Student System.

Step 2 - Access the Validation Codes (VAL) form.

Step 3 - At the Validation Code ID LookUp prompt, enter COMMON.SCHOOL.IDS.

Step 4 - Replace the sample information on this form with the actual Routing IDs assigned to your institution.
- Be sure to remove any sample codes that remain after you have entered all of your Routing IDs.

Step 5 - Save your work and exit the VAL form.

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Assigning Routing IDs to FA Offices
Responsibility: **RIS**

The two variations of this procedure are for single-campus institutions that send just one Routing ID or for multi-campus institutions that use numerous
Routing IDs (this includes situations where more than one institution shares a single Colleague database). Follow the procedure that is appropriate for your situation.

These procedures assume you have already done the following:
- Set up your institution's system of FA offices. If you have not already created all of your FA offices, or if you want to make changes to your system of FA offices, see Getting Started with the Student System for instructions.
- Obtained your Routing ID(s) from the COD School Relations Center. See "How to Obtain Your Routing ID" on page 2-26 for more information.
- Populated your COMMON.SCHOOL.IDS validation code table with your assigned Routing ID(s). See "Setting Up Routing ID Validation Codes" beginning on page 2-28 for more information.

For more information about any of the fields described in these procedures, see "Fields on the CSID and CSOF Forms".

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Setting Up a Single Routing ID
Responsibility: **RIS**

Use the following steps to set up a single Routing ID for your institution. This procedure applies to all institutions that report all of their Financial Aid information through a single campus or office to the COD System.

Step 1 - Access the COD Institutional Defaults (CSID) form.

Step 2 - Enter your Routing ID in each of the following fields:
- Pell Reporting Routing ID
- Pell Attended Routing ID

Step 3 - Does your institution process Direct Loans through Colleague?
> Yes. Enter your Routing ID in the following fields:
> > •DL Reporting Routing ID
> > •DL Attended Routing ID
>
> No. Continue with the next step.

Step 4 - Save your work and exit the CSID form.

Step 5 - Access the COD Parameter Definition (CODP) form.

Step 6 - Enter your Source Entity Routing ID in the Source Entity ID field.

Step 7 - Save your work and exit the CODP form.

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Setting Up Multiple Routing IDs
Responsibility: **RIS**

Use the following steps to set up multiple Routing IDs for your institution. This procedure applies to all institutions that want to report their Financial Aid information to the COD System from multiple FA offices.

Step 1 - Access the COD Parameter Definition (CODP) form.

Step 2 - Enter your Source Entity Routing ID in the Source Entity ID field.

Step 3 - Save your work and exit the CODP form.

Step 4 - Access the COD Institutional Defaults (CSID) form.

Step 5 - In the Pell Reporting Routing ID field, enter the Routing ID you want to use as your default Pell Reporting Entity in cases where an office-specific Routing ID cannot be determined. SD has this set to the Routing ID that is assigned to RIS.

Step 6 - In the Pell Attended Routing ID field, enter the Routing ID you want to use as your default Pell Attended Entity in cases where an office-specific Routing ID cannot be determined. SD does not populate this field.

Step 7 - Does your institution processes Direct Loans through Colleague?
        Yes. Enter your default Routing IDs in the following fields:
                •DL Reporting Routing ID (SD does not use Direct Loans)
                •DL Attended Routing ID (SD does not use Direct Loans)
        No. Continue with the next step. (SD does not use Direct Loans)

Step 8 - Save your work and exit the CSID form.

Step 9 - Access the FA Office COD Parameters (CSOF) form.

 Step 10 - At the FA Office LookUp prompt, select the office you want to set up.

Step 11 - For each of the following fields, if different from the institutional defaults, enter the Routing ID under which you want to report information to the COD System for this FA office:
- Pell Rpting Routing ID
- Pell Attd Routing ID
- DL Rpting Routing ID (SD does not use Direct Loans)
- DL Attended Routing ID (SD does not use Direct Loans)

You do not need to enter information in any field where the system default (shown in the right-hand column) is the same Routing ID you want to use for this office.

South Dakota Colleague System Procedures

You do not need to enter information in the DL fields if your institution does not process Direct Loans through Colleague. If you do use Colleague for Direct Loan processing, you must enter the same number in both of the DL fields.

Step 12 - Save your work on the CSOF form.

Step 13 - Repeat **Step 10** through **Step 12** as needed for each FA office you need to set up.

Step 14 - Exit the CSOF form.

Step 15 - Do you need to assign Pell Attended Routing IDs to any specific FA Locations?
   Yes. Continue with the next step. SD has each university location set up.
   No. You are done with this procedure.

Step 16 - Access the FA Locations Definition (FLCD) form.

Step 17 - At the Location LookUp prompt, select the FA Location you want to update.

Step 18 - In the Pell Attended Routing ID field, enter the Routing ID you want to report as your Pell Attended Entity for students assigned to this location.

Step 19 - Save your work on the FLCD form.

Step 20 - Repeat **Step 17** through **Step 19** for each FA Location to which you need to assign a Pell Attended Routing ID.

Step 21 - Exit the FLCD form.

South Dakota Colleague System Procedures

Setting Up COD Parameters

Responsibility: **RIS**

Step 1 - Access the COD Parameter Definition (CODP) form.

Step 2 - Complete the fields on the CODP form as needed.
* See "Noteworthy Fields on the CODP Form" online help for more information about any of the fields on this form.

ALERT! We strongly recommend that you do not change either of the Message Class fields without first consulting AnswerNet page 2354 or a Technical Support representative.

Step 3 - Save your settings and exit the CODP form.

South Dakota Colleague System Procedures

Awarding Pell to a Student

Responsibility: Institution
Timeframe: on going

Use this procedure to award a Pell grant to a student.

The information in this procedure can also help you modify information for an existing award.

Step 1 - Access the Award Detail Entry (AIDE) form.

Step 2 - At the Academic Year Lookup, enter the applicable Academic Year.

Step 3 - At the Person Lookup, enter the student to whom you want to award a Pell grant.
  * Enter the Student ID if you know it, or perform a Person LookUp to locate the student in the database.

Step 4 - In the Award field, go to a blank line and enter a Pell award code.
  * If you have eligibility checking turned on, Colleague evaluates whether the student is eligible for the award. If the student is not eligible, Colleague displays the Award Eligibility Status (AECF) form, on which you can override the student's ineligible status.

Step 5 - In the Amount field on the same line, enter the amount of the Pell award.

Step 6 - Do you want to view or modify any details about this award?
     Yes. Continue with the next Step.
     No. You are done with the procedure. Save your work and exit the AIDE form.

Step 7 - Return to the Award field and detail to the Pell COD Disbursements (PLCD) form.
  * Colleague displays a mini-menu from which you select the PLCD form.
  * Any other forms on the menu are not used in this procedure.

Step 8 - Review the disbursement information on the PLCD form, and enter or change any information as needed.
  * For more information about the fields on this form, see online help or "Noteworthy Fields on the PLCD Form".

Step 9 - Do you want to view or modify any additional details about this award?
     Yes. Continue with the next Step.
     No. Continue with **Step 1**2.

Step 10 - When you are done updating information, save your work and exit the PLCD form.
  * Colleague returns you to the AIDE form.

Step 11 - Save your work and exit the AIDE form.

Note: Once the award is disbursed Colleague will transmit the new award information to the COD system the next time you run the Export COD XML Records (CODE) process with this student in the selection criteria and the Pell flag set to "Yes,"

South Dakota Colleague System Procedures

Exporting COD Information to SAIG

Responsibility: Institution
Timeframe: on going

Step 1 - Access the Export COD XML Records (CODE) form.

Step 2 - In the Academic Year field, enter the year for which you want to export financial aid information.

Step 3 - To export Pell information, enter Y in the Pell Common Export field.

Step 4 - To export Direct Loan information, enter Y in the Direct Loan Common Export field.
- You can export both Pell and DL information at the same time by entering Y in both of the above fields.

Step 5 - Is Colleague running on a Windows operating system at your institution?
Yes. Enter Y in the Using EDconnect on the PC field.
No. Enter N in the Using EDconnect on the PC field. **(SD uses NO)**

Step 6 - Do you want to restrict export to one or more specific students?
Yes. Enter selection criteria in the Savedlist Name and/or Students fields, or enter Y in the Additional Selection Criteria field. Use XPRY to create a savelist of students with a Pell at your institution.

No. Leave the Savedlist Name and Students fields blank, and leave the Additional Selection Criteria field set to "No." This allows Colleague to export information for all students who have records that are ready for export.

Step 7 - In the Report Options field, enter your output preference for the COD Processed Record report. For details on the options see "Noteworthy Fields on the CODE Form".

Step 8 - Save your work and exit the CODE form.
- Colleague opens the first of two Peripheral Defaults forms.

Step 9 - On the first Peripheral Defaults form, enter your output preferences for the CODE Processed Records Report.

Step 10 - On the second Peripheral Defaults form, enter your output preferences for the FA Error Report.

Step 11 - Complete the Process Handler form according to your preferences.
- When you finish out of the Process Handler form, Colleague evaluates the selected students' financial aid files, builds an XML document containing all required information, saves the XML document in the COD.SEND.DIR, and invokes TDClient to forward the file to SAIG.

Troubleshooting the CODE Process
Responsibility: **RIS**

This section discusses several of the error messages that can occur during the CODE process.

Error Messages
WRITESEQ failed to write the Header info
- Cause: You don't have permission to write to the COD.SEND.DIR.
- Solution: Contact your system administrator for permission to write to the COD.SEND.DIR.

Could not WRITESEQ the trailer info to COD.SEND.DIR for record
- Cause: You don't have permission to write to the COD.SEND.DIR.
- Solution: Contact your system administrator for permission to write to the COD.SEND.DIR.

xxxxxxx incomplete address - make changes on CPS website
- Cause: The address is missing information.
- Solution: Enter the missing address information on the CPS Web site. CPS will send a new transaction to you. Import the new ISIR transaction with the complete address from the CPS database.

xxxxxxx has a foreign address - no address will be sent to COD
- Cause: The address has the foreign country code in the state field.
- Solution: Contact the applicant to acquire a domestic address and enter it in the CPS database via the CPS Web site. CPS will send a new transaction to you. Import the new ISIR transaction with the domestic address from the CPS database.

South Dakota Colleague System Procedures

Importing Files from SAIG

Responsibility: **RIS**

Timeframe: daily

Note: this will only be run in the combined account.

Follow the steps below to import COD information from the SAIG website.

Step 1 - Access the Department of Ed Import (DOEI) form.

Step 2 – Indicate which steps you wish to perform in the Process Steps field.

Step 3 – Indicate which type of report you want in the Reports Options field.

Step 4 - Finish out of the DOEI form.

Note: After performing these steps, remember to run any other processes necessary to extract information from flat files and populate more information.

Note: If you need to troubleshoot the import process, you can select one of the other options. Work with your System Administrator, and see "Process Steps" for information about each option.

Step 5 - Complete the Peripheral Defaults and Process Handler forms as needed.

Note: Consider setting up the DOEI process as a scheduled background process to run periodically without any user intervention. See Run-Time Administration for more detailed information.

South Dakota Colleague System Procedures

Troubleshooting the DOEI Process
Responsibility: **RIS**

This section discusses several of the error messages that can occur during the CODE process.

Error Messages
Award Type Award: Award ID — Not Updated, More current info on file
* Cause: This error is associated with the loading of Direct Loan awards. Specific date and time fields in the award file are compared against the date and time associated to the incoming Document ID. If the incoming Document ID is less
* than all of the existing date and time fields stored in the award file, then this message is displayed.
* Solution: No action is required. It is not necessary to update the DL award information based on the incoming document.

Pell Award: Award ID — Not Updated, More current info on file
* Cause: This error is associated with the loading of a Pell Award. Specific date and time fields in the award file are compared against the date and time associated to the incoming Document ID. If the incoming Document ID is less than all of the existing date and time fields stored in the award file, then this message is displayed.
* Solution: No action is required. It is not necessary to update the Pell award information based on the incoming document.

Disb: Disb Number— Not Updated, More current info on file
* Cause: This error can be generated for either an incoming Pell or Direct Loan Disbursement Sequence record. If the incoming Document ID contained in the disbursement sequence file is greater than the Document ID contained on the imported document, this message is displayed.
* Solution: No action is required. The disbursement sequence file does not need to be updated.

Disb: Disb Number— Not Updated, Incoming reject accepted on file, store rejected ID only
* Cause: This error can be generated for either an incoming Pell or Direct Loan Disbursement Sequence record. An incoming, rejected Disbursement Sequence record is encountered when an accepted disbursement is already on file. The Document ID, however, is captured in a 'rejected document' field in the disbursement sequence file for reference. This 'rejected document' field is cleared whenever the next valid disbursement record is loaded.
* Solution: No action is required.

'Pell ID' — Not Updated, Can't determine year for Pell, SSN=999999999
* Cause: The incoming document does not contain the year associated to the Pell award. This message means that the incoming XML document is invalid or formatted incorrectly.
* Solution: Contact COD to resolve this issue.

'Pell ID' — Not Updated, Can't determine Colleague ID for Pell, SSN=999999999

South Dakota Colleague System Procedures

- Cause: No match can be found in Colleague for the student's SSN associated with the incoming XML document. A SSN match is required to find the student's Colleague ID. The files that store the incoming information about Pell awards use the student's Colleague ID as part of the key to the file. Because
- of this, DOEI is unable to load the student's Pell award into the files Colleague stores incoming Pell information in. In this case, the XML document remains in the COD.RECEIVE.DIR directory until the student is added to Colleague.
- Solution: Add the student, and the students SSN, to the Colleague database on the Name and Address Entry (NAE) form or use the FA COD Identifier Change (FCDC) form to update the student's SSN. After you have added the student to Colleague or updated the SSN, re-run the DOEI process to import the student's Pell award.

Pell ID' — Not Updated, Can't determine Attended Campus for Pell, SSN=999999999

- Cause: The incoming document does not contain an Attended Campus value, which is used to construct a key to the Pell files. This message means that the incoming XML document is invalid or formatted incorrectly.
- Solution: Contact COD to resolve this issue.

South Dakota Colleague System Procedures

Importing MRR and Reconciliation Records
Responsibility: **RIS**
Timeframe: when available

Before you can import this information into Colleague, you must download the data files from the COD System. See "Importing Files From SAIG" for instructions about using the Department of Ed Import (DOEI) form.

Step 1 - Access the Import COD Pell Reports (ICPR) form.

Step 2 - In the Academic Year field, enter the year for which you are processing data.

Step 3 - Are you processing MRR records, or Reconciliation records?
    MRR. Enter the name of the file to process, then continue with **Step 4**.
    Reconciliation. Enter the name of the file to process, then skip to **Step 5**.

Step 4 - In the Pell Attended Campuses field, enter all of the Pell Attended Campus codes used at your institution.

Step 5 - Finish out of the ICPR form.

Step 6 - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

South Dakota Colleague System Procedures

Reviewing and Deleting Unprocessed Files
Responsibility: **RIS**

Step 1 - Access the Unprocessed File Imports (UFIF) form.

Step 2 - Review the list of files displayed.

Step 3 - To view the contents of any of the files, go to the desired line and detail to the Comments form.
- When you are done viewing the file, finish or cancel out of the Comments form.

Step 4 - To delete unneeded files, enter Y in the Delete column of all files to be deleted.

Step 5 - Finish out of the UFIF form.
- Colleague opens a Comments form and displays a list of the files to be deleted.

Step 6 - After reviewing the list, finish or cancel out of the Comments form.
- Colleague returns you to the UFIF form and immediately displays the "Update, Cancel, or Return" dialogue box.

Step 7 - Do you want to proceed with deleting the listed files, exit without deleting any of the files, or make changes to the files selected for deletion?
- Proceed with deleting. Update out of the UFIF form.
- Exit without deleting. Cancel out of the UFIF form.
- Make changes. Return to the form, add or remove Y flags as needed, and return to **Step 5**.

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South Dakota Colleague System Procedures

Viewing Supported Message Classes
Responsibility: **RIS**

Step 1 - Access the FA Message Class Code Table (FAMC) form.

Step 2 - At the Message Class LookUp prompt, perform a standard LookUp.
- Colleague displays a resolution form listing all available message classes.

Step 3 - Review the list of message classes.

Step 4 - When you are done viewing information, finish or cancel out of the resolution form and the FAMC form.

South Dakota Colleague System Procedures

Finding Document Errors
Responsibility: **RIS**
Timeframe:

Step 1 - Access the COD Document Information (CODD) form.

Step 2 - At the COD Document LookUp prompt, perform a Standard LookUp.
  - Colleague displays a resolution form with all documents that have been received with errors or warnings, and which you have not already removed from the resolution.

Step 3 - Select a document from the resolution form.
  - Colleague displays document information on the CODD form.

Step 4 - To see additional information about a particular error or warning code, go to the desired line in the Error field and detail to the COD Document Response Errors (CDRE) form.
  - When you are done viewing details, return to the CODD form.

Step 5 - Optionally record Comments about this document.

Step 6 - Do you want to remove this document from the resolution form from now on?
      Yes. Enter Y in the Remove from Resolution field.
      No. Enter N in the Remove from Resolution field, or leave the field blank.

Step 7 - Save your work and exit the CODD form.

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South Dakota Colleague System Procedures

Identifying Missing COD Responses
Responsibility: Instutution
Timeframe: ongoing

Step 1 - Access the COD Missing Response Report (CDMR) form.

Step 2 - Complete the following required fields:
- Academic Year
- Award Type
- As of Date

Step 3 - Optionally enter selection criteria in the other fields on this form to limit the number of students on the report.

Step 4 - Save your work and exit the CDMR form.

Step 5 - Did you enter Y in the Additional Selection Criteria field?
> Yes. Colleague opens the Additional Selection Criteria form. Build a query to select students from the SA.ACYR file, then finish out of the form.
>
> No. Colleague opens the Peripheral Defaults form. Continue with the next step.

Step 6 - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

South Dakota Colleague System Procedures

Running the COD Accepted Response Report

Responsibility: Institution
Timeframe: on going

Step 1 - Access the COD Accepted Response Report (CARR) form.

Step 2 - Using any of the fields on the form, enter selection criteria to limit the scope of the report to meet your needs.

Step 3 - Finish out of the CARR form.

Step 4 - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

South Dakota Colleague System Procedures

Viewing a List of a Student's Awards

Responsibility: Institution
Timeframe: on going

After using the Pell COD Reject Report (PCRR) form to produce a list of students with rejected Pell records, you can use the Pell COD Inquiry (PCOD) form to begin researching the problems.

The PCOD form lists all of the Pell awards associated with this student in the selected year. The information displayed comes from both Colleague and the COD Response record.

Viewing a Reconciliation Record

Responsibility: Institution
Timeframe: on going

Use the Pell Reconciliation Inquiry (PERI) form to view information from a student's reconciliation record.

You can access the PERI form only by detailing from the Pell COD Inquiry (PCOD) form.

South Dakota Colleague System Procedures

Viewing Details of Award Disbursements
Responsibility: Institution
Timeframe: on going

Use the Pell COD Disbursement (PLDT) form to compare data sent by the institution to data received in the COD Response for an individual sequence number for a disbursement.

The PLDT form displays the following information:
- Disb Amount. Displays the amount of the disbursement for this sequence number.
- Disb Date. Displays the date of this disbursement.
- Change Date. In the School column, displays the date the information was exported via the Export COD XML Records (CODE) process to the Department of Education. In the COD Response column, displays the date the COD Response was received back from the Department.
- Pymt Pd Start. Displays the award period start date. This is the earliest start date of the earliest award period flagged for Pell on the student's attendance pattern.
- Payment Ind. Indicates whether this sequence represents an anticipated disbursement or an actual disbursement. An anticipated disbursement shows N in the School column and F in the COD Response column; an actual disbursement shows Y and T in the respective columns.
- Response Ind. Displays the status of the response received from COD. Values are A for Accepted, R for Rejected, and C for Correction. Response Errors. Displays any warning or error codes received from COD, and allows you to detail to the COD Import Response Errors (CIRE) form for more information.
- Document ID. Displays the ID of the XML document on which the disbursement sequence was most recently exported. Use this as a reference number when resolving document errors with the COD System.

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South Dakota Colleague System Procedures

Viewing a History of an Award Disbursement

Responsibility: Institution
Timeframe: on going

Use the Pell COD History Summary (PLHS) form to see a list of all sequence numbers for a selected disbursement.

From the Seq (Sequence Number) field you can detail to the Pell COD Disbursement (PLDT) form for more information about the specific sequence number.

If this form is blank, it means you are still waiting for a response from the COD System. This can happen even if you previously had a rejected response that appeared here. When you export corrections for a rejected disbursement, the disbursement sequence number remains the same. In that situation, the CODE process clears the previous response information so that it is obvious when the new response arrives—if it appears here, you know it is the "current" response information.

South Dakota Colleague System Procedures

Viewing Details About a COD Response Error

Responsibility: Institution
Timeframe: on going

Use the COD Import Response Error (CIRE) form to view detailed information about a COD Response error.

To fix these errors, correct the data in Colleague and then run the Export COD XML Records (CODE) process to send the corrected data to COD.

The following fields are displayed on this form:
- Code. Displays the error code number. All error codes and their descriptions are stored in the COD.REASONS file.
- Error Type. Displays the type of error. The possible error types are W for Warning, R for Rejected, and C for Correction.
- Field. Displays the field or tag name that COD sent to indicate which piece of data is incorrect.
- COD Value. Displays the new, corrected field value from COD if a correction has been applied.
- Reported Value. Displays the value of the field as reported by the school.

South Dakota Colleague System Procedures

Viewing Upcoming Pell Disbursements

Responsibility: Institution
Timeframe: on going

Step 1 - Access the Pell Upcoming Disbursement (PLUD) form.

Step 2 - In the Academic Year field, enter the academic year of the data to process.

Step 3 - Optionally limit the Pell awards included on the report by entering a saved list of IDs from the PELL.ACYR file in the Savedlist Name field or by entering Y in the Additional Selection Criteria field.

Step 4 - Save your work and exit the PLUD form.

Step 5 - Did you enter Y in the Additional Selection Criteria field?
Yes. Colleague opens the Additional Selection Criteria form. Build a query to select awards from the PELL.ACYR file, then finish out of the form.

No. Colleague opens the Peripheral Defaults form. Continue with the next step.

Step 6 - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

South Dakota Colleague System Procedures

Viewing Institution-Wide Pell Disbursement Information

Responsibility: Institution
Timeframe: When RIS notifies institution

Use the Electronic Statement of Account (ESOA) form to view institution wide information on Pell Grant money shifted from the GAPS account to your institution's Pell program. The ESOA process creates a print file from an ESOA file in the FA.RECEIVE directory. The process selects files from the FA.RECEIVE directory and have a record name that begins with "PGAS." The ESOA form can process a single file or multiple files.

South Dakota Colleague System Procedures

Running the COD Comparison Report

Responsibility: Institution
Timeframe: on going

NOTE - SD uses XRAY for this same purpose

Step 1 - Access the COD Comparison Report (CODC) form.

Step 2 - Complete the following required fields:
- FA Year
- Award Type
- Variance Only

Step 3 - Optionally enter selection criteria in the other fields on this form to limit the number of students on the report.

Step 4 - Save your work and exit the CODC form.

Step 5 - Did you enter Y in the Additional Selection Criteria field?
> Yes. Colleague opens the Additional Selection Criteria form. Build a query to select students from the SA.ACYR file, then finish out of the form.

> No. Colleague opens the Peripheral Defaults form. Continue with the next step.

Step 6 - Complete the Peripheral Defaults and Process Handler forms according to your preferences.

Step 7 - Review the report. If there are any variances, see "Fixing Discrepancies" for guidance.

Generating the MRR Listings (MRLR)

Responsibility: Institution
Timeframe: on going

Use the MRR Listings (MRLR) form to display MRR records imported from the COD system for selected students.

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South Dakota Colleague System Procedures

Viewing and Resolving MRRs

Responsibility: Institution
Timeframe: on going

Step 1 - Access the Pell Multi Reporting Records (PMRR) form.

Step 2 - Complete the fields. For information about specific fields, see the online help.

Step 3 - The cursor displays in the Seq No column.
- To view/enter information associated with a particular MRR, place the cursor in the Seq No column of the MRR, then detail to view the Student MRR (SMRR) form.
- This field contains an MRR ID. This MRR is associated to the student you've entered at the ID prompt.

Step 4 - Optional: If you detail at the Seq No column, the Student MRR (SMRR) form displays.

South Dakota Colleague System Procedures

Viewing Detailed Information on an Individual Student's MRR

Responsibility: Institution
Timeframe: on going

Use the Student MRR (SMRR) form to view information on an individual MRR. Use the SMRR form to enter a date and comments for the resolution.

The SMRR form displays detailed information on individual MRRs, including the date the MRR was received, MRR codes, and contact information for other institutions involved with the student.

Linking MRRs and Reporting on Linked/Unlinked MRRs

Responsibility: Insitution
Timeframe: on going

Use the Unlinked MRRs (ULMR) form to link MRRs to a student and to report MRRs that are linked/remain unlinked. The ULMR process can be run in a simulation mode which does not actually link MRRs to students. The simulation mode reports which MRRs would be successfully linked and what problems you would run into if you run the ULMR process outside of the simulation mode.

South Dakota Colleague System Procedures

Producing the PRER Report

Responsibility: Instutuion
Timeframe: on going

Step 1 - Access the Pell Reconciliation Report (PRER) form.

Step 2 - In the Report Type field, specify the type of report you want to produce by entering A (All) to report all students regardless of whether or not a variance exists, or V (Variance) for only those students with a variance between Colleague and Pell year-to-date amounts.

Step 3 - Enter search criteria to select the students you want to process.

Step 4 - Finish out of the form to have Colleague run the report.

South Dakota Colleague System Procedures

Troubleshooting Missing Document Responses
Responsibility: **RIS**

Follow the steps below to remedy those situations in which you have exported a document, run the DOEI form to import Responses, and are missing a Response for a particular document.

Step 1 - Identify which documents are missing COD Responses by running the CDMR report. See "Locating Missing COD Responses" for more information on completing the CDMR. The CDMR report provides the document ID for the document that is missing a Response.

Step 2 - Look for the document that is missing a Response in the COD.SEND.DIR directory. The document could be "stuck" in this directory.
- At the colon (:) prompt, perform a find in the COD.SEND.DIR directory to locate the document using its document ID from the CDMR report, rather than its Colleague Job ID.
- FIND COD.SEND.DIR document ID

Step 3 - If you find that the document is "stuck" in the COD.SEND.DIR directory, complete the substeps below to remedy the situation.
- If the file is not in the COD.SEND.DIR directory, continue with the next step.
    - Ensure that TDClient is present and is functioning correctly. See the Department of Education's documentation for TDClient for more information.2
    - Ensure that the COD.SEND.DIR, the FA.SEND.DIR, and FA.SEND.ARCH.DIR directories are set up correctly and do not have rights protection (file permission) issues.
    - Complete the Send Files to SAIG (SFTS) form to clear the "stuck" file from the COD.SEND.DIR directory.
    - The SFTS form scans the FA.SEND.DIR and COD.SEND.DIR files, selects all files containing the O*N05 header, and sends them to your SAIG Mailbox. The SFTS form also saves archive copies of the
    - Once you have completed the SFTS form, review its report to ensure that the "stuck" document was exported. When the document is successfully exported, the COD.SEND.DIR directory is empty and a copy of the exported file is stored in the FA.SEND.ARCH.DIR directory.

Note: A document stuck in the COD.SEND.DIR is keyed by its Colleague Job ID, which includes the process name, user ID, and system date/time, for example, CODE_SMITHM_48823_13015.

Step 4 - Look for the document that is missing a Response in the FA.SEND.ARCH.DIR directory.
- At the colon (:) prompt, perform a find in the FA.SEND.ARCH.DIR directory to locate the document using its document ID rather than its Colleague Job ID.

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South Dakota Colleague System Procedures

- FIND FA.SEND.ARCH.DIR document ID

Step 5 - If you find a copy of the document file in the FA.SEND.ARCH.DIR directory, you know the file was successfully exported to the SAIG mailbox. Continue with "Troubleshooting the SAIG Mailbox/COD" in this procedure.

Note: Do not, in the case of a "stuck" document, resend the document using the RSND form (for academic year 2004/2005) or the CODE form (for academic year 2003/2004). The RSND and CODE forms send a copy of the file from the FA.ARCH.SEND.DIR directory, and would leave the "stuck" file in the COD.SEND.DIR directory. Resend the document only in those cases when the file has been successfully exported from Colleague, but must be sent again.

Note: A file in the FA.SEND.ARCH.DIR is keyed by its Colleague Job ID, which includes the process name, user ID, and system date/time, for example, CODE_SMITHM_48823_13015.

1. Note, if a CODE export fails due to a DMI issue, the student's information is not exported and the student's ID appears on the error report for the CODE form.

2. Note, if an export fails due to a DMI issue, the student's information is not exported and the student's ID appears on the error report for the CODE form. exported records in the FA.SEND.ARCH.DIR file.

Troubleshooting the SAIG Mailbox/COD
Responsibility: **RIS**

Step 1 - If the document has been successfully exported from Colleague but you do not find it in your SAIG mailbox, complete the substeps below:

If you find the document in your SAIG mailbox, continue with the next step.
- Notify ED that the successfully exported document (provide the document ID) is not present in the SAIG mailbox, so that the department is aware of this issue.
- Notify Datatel Solution Center that the successfully exported document (provide the document ID) is not present in the SAIG mailbox.
- Resend the document using the appropriate form below:
    - For 2004/2005 and later years, resend the document using the RSND form. See "Resending COD Information for 2004/2005 and Later Years" for more information.
    - For years 2003/2004 and earlier, set the resend flag on the appropriate form and then resend the file using the CODE form. See "Resending COD Information for 2003/2004" for more information.

Step 2 - If the document has a status of Available in the SAIG mailbox, but has not been swept by the EAI bus (In this case, the problem is likely with the COD system.):
- Contact ED (provide the document ID) to determine why the file hasn't been swept by the EAI bus.
- If requested by ED, resend the document using the appropriate form below:
    - For 2004/2005 and later years, resend the document file using the RSND form. See "Resending COD Information for 2004/2005 and Later Years" beginning on page B-47 for more information.
    - For years 2003/2004 and earlier, set the resend flag on the appropriate form and then resend the file using the CODE form. See "Resending

Note: Resending documents invariably results in duplicate rejects, but does enable the COD system to process the original file and reject the duplicate. COD Information for 2003/2004" for more information.

Step 3 - If the file is in your SAIG mailbox with a status of Received, but the COD system has not produced a Response (In this case, the problem is most likely with the COD system.):
- Change the file status to Available, so that it can be swept again by the EAI bus.
- Notify ED (provide the document ID) of the problem, so that ED has an opportunity to remedy any problems with the COD system.
- If requested by ED, resend the document using the appropriate form
- below:

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- o For 2004/2005 and later years, resend the document file using the RSND form. See "Resending COD Information for 2004/2005 and Later Years" for more information.
- o For years 2003/2004 and earlier, set the resend flag on the appropriate form and then resend the file using the CODE form. See "Resending COD Information for 2003/2004" for more information.

Troubleshooting the Colleague Import

Responsibility: **RIS**
Timeframe:

To troubleshoot problems with the Department of Ed Import (DOEI) process during setup and anytime, complete the following steps:

Step 1 - Complete the DOEI form using the D—Student Detail Report option.

Step 2 - Consult the detailed report for the DOEI form. See "Troubleshooting the DOEI Process" on page 5-11 for an explanation of DOEI errors.

Note: Resending documents invariably results in duplicate rejects, but does enable the COD system to process the original file and reject the duplicate.

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Step 3 - Review the DOEI Log file to help troubleshoot problems with DOEI imports.
- The DOEI Log file is created in the FA.COD.LOG.DIR directory when you run the DOEI process. The key to the file is the Colleague Job ID for the process.
- A sample, partial DOEI job log appears below. The complete log file for this process was 104 lines long.

```
0001: Processing Job: DOEI_PBW_61762_13269 START TIME =
17:09:42
0002:
0003: Process Level Selected = 1
0004:
0005: Getting paths to files:
0006: Path for FTP.RECEIVE.DIR is /usr1/r17/
colldev/FTP.RECEIVE.DIR
0007: Path for COD.RECEIVE.DIR is /usr1/r17/
colldev/COD.RECEIVE.DIR
0008: Path for FA.RECEIVE.DIR is /usr1/r17/
colldev/FA.RECEIVE.DIR
0009:
0010: Calling TDClient
0011: -C tdclientc network=saigportal
ftpuserid=TG52683
ftppasswd=********** reset
'transfer=(name=datatelrecv receive=/usr1/r17/
colldev/FTP.RECEIVE.DIR /DOEI_PBW_61762_13269
DATA_OVER_COMMAND=Y UNCOMP=Y APPEND=Y AUTOEXT=N)'
0012: WARNING: Logon to server failed
0013: Login for UserId: [TG52683] failed
0014: (533) FTP login failed.533 Login incorrect
```

Step 4 - Ensure that your institution's SAIG password is updated. A SAIG password is required to download files from your SAIG mailbox. The password expires every 90 days. Five days before the password expires, Colleague begins delivering a warning message when the DOEI form is run. See "Setting Up COD Parameters" for more information. See the SAIG website for instructions on receiving and renewing the password.

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Step 5 - Ensure that DMI is functioning correctly and that it is able to call TDClient.

Step 6 - Ensure that the FA COD Login ID you enter on the DOEI form is in the DMI Registry. Your System Administrator can create the Login and assign a password for you, using instructions found in the DMI Installation or Web Administration manuals.See "Creating DMI Users for Running the Import Process" for additional details and requirements for this DMI Login.

Step 7 - Choose the process steps you want the import to perform to complete the import, based on what you learn from detailed report and the DOEI log file.

In the Process Steps field, you can enter one of the following options to perform a subset of the import tasks:3

> Option 2 – TDClient/Archive. Performs the first two steps— downloads information from SAIG and creates an archive copy.

> Option 3 – Java Parser. Performs only the third step—separates the files and records, and stores them in the correct directory files.

> Option 4 – Ping/Login/Logout. Performs the fourth, sixth, and ninth steps— makes sure you can communicate with DMI.

> Option 5 – Ping/Login/Trans/Logout. Performs the fourth through seventh steps, and the ninth step—breaks the XML files down into DMI transactions, but does not update Colleague's database.

> Option 6 – Ping/Login/Trans/Updt/LO. Performs the fourth through ninth steps— breaks the XML files down into DMI transactions, and updates Colleague's database.

Step 8 - Review the DOEI standard report to determine if Colleague data is newer than the Response data you are importing. If this is the case, the DOEI form does not update the student's records and generates an error for the student.