

**Residential
Life**

South Dakota College League
Process System Project

BHSU

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South Dakota Colleague System Procedures

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Revisions with this update

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Preface

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Colleague System Instructions

Responsibility: University

Colleague Access

Accessing Colleague from Windows

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

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

<p>SOUTH DAKOTA BOARD OF REGENTS</p> <p>DATATEL PRODUCTION</p> <p>login: userid userid 's Password:</p>

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 Changing 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**.

- Press enter at the prompts until the following screen displays.

<p>South Dakota Board of Regents Student Information Production System Dakota State University</p> <p>Main Menu</p> <ol style="list-style-type: none">1. Live Account2. Change Password3. Schedule 254. Log Off <p>Enter your selection[1-4]:</p>
--

- At the cursor, make the desired selection.
Select **1** to access production screens.

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Select **2** to change your password.
Select **4** to log off of Colleague.

Selection 1: Live Account

The following screen will display.

```
UniData Release 3.3.2
Copyright (C) Unidata, Inc. (USA) 1995
All rights reserved.
Current UniData home is /usr/ud33/.
Current working directory is /datatel/dsu/live/liverem/livecomp.
GUI MODE (Y/N)
```

At the prompt, select **N** for text mode or select **Y** for GUI mode. Either choice must be capitalized.

The following Colleague menu will display. Security may be different by user, therefore, options on the main menu may not be alike nor like the one displayed here.

```
-----
| 06/16/98 14:55                Student System                Student System |
|                               Dakota State University - Live Account |
| XXXXXXXXX                    Colleague 15.0                    |
|-----|
| 1 AC  Academic Records |
| 2 AM  Recruitment/Admissions Mgt |
| 3 CU  Curriculum Management |
| 4 DA  Degree Audit |
| 5 DM  Person Demographics |
| 6 FI  Faculty Information |
| 7 RG  Registration |
| 8 DA  Degree Audit |
| 9 LO  Logout |
| 10 FA Financial Aid |
| 11 FRP Federal Reporting |
|
| Enter Mnemonic or Selection Number, or press FINISH:  |
|XXXXXXXXXXXXXXXXXX Press HELP for assistanceXXXXXXXXXXXXXXXXXXXXXXXXXXXX|
```

Selection 2 – Change Password

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:
```

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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.

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.

NOTE: The "rules" can be seen on screen by selecting the "Change Password" option, enter the old password, and then press <ENTER> at the "New Password" prompt.

- 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.

Selection 3 – Log off

- Enter the mnemonic **LO** at any menu screen.
- Enter **4** on the Main Menu Options screen to exit Colleague.
- The message "Good Bye" should display indicating that the logoff procedure is successful.
- Select **File** and then **Exit** to close the Colleague program.

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Function Key Template

				Ctrl					Ctrl		
				Alt					Alt		
Proc. Help	F. Key Help	Ins Group	Scroll to pg #	Shift	Prev Window	Prev Field	Cancel	Prev Element	Shift	Exit	Del Record
Field Help	Detail	Grp. Jump	Field Jump		Next Window	Next Field	Direct Acc	Next Element		Finish	Update
F1	F2	F3	F4		F5	F6	F8	F7		F9	F10

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

F1 F1 → Field Help provides a list of valid field values that are 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 an asterisk (*) between the field number and the field label

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

F3 → Window JUMP (Group Jump) moves the cursor to the exact group number specified.

Shift F3 → Window INSERT (Ins Group) adds a blank line where the cursor is.

F4 → Field JUMP moves you to a specified field without pausing at every field between. You must indicate where you would like to move the cursor.

Shift F4 → Window Page JUMP (Scroll to pg #) allows you to move to a certain window indicated by its page number.

F5 → Window FWD (Next Window) moves the cursor to the line directly below its current position in a window. Windows are indicated by a number followed by a colon.

Shift F5 → Window BACK – (Prev Window) moves the cursor to the line directly above its current position in a window

F6 → Field FWD (Next Field) moves the cursor forward to the next field (indicated by a field number).

Shift F6 → Field BACK (Prev Field) moves the cursor back one field.

F7 → Element FWD (Next Element) moves the cursor forward to the next element or column within a given line or “group”.

Shift F7 → Element BACK (Prev Element) moves the cursor back to the previous element or column within a line or “group”.

F8 → Direct ACCESS takes you directly to another process from the current screen without returning to the menu

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 menu or process

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Shift F9 → EXIT saves new data and always returns you to a menu

F10 → UPDATE saves changes you have made on a screen and returns you to the same screen for additional entry. This is the opposite of the CANCEL function.

Shift F10 → Record DELETE deletes an entire record. Sometimes deleting a record requires many steps. These are a protection against accidentally deleting a record by pressing a key.

QUICK TIPS

- ✧ To display the last person, term, section, etc.. displayed use @ on the command line.
- ✧ To display a list of table values on a field press F1 F1.
- ✧ To display a list of table values when the cursor is on the command line type "...".
- ✧ Always Cancel (Shift F8) from a screen you are not updating.

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".

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Phonetic Name Search

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

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

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

Other Searches

Course or Section Search

Enter XXXX-000-00

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

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

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

Example: BIOL-101-D01

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

Term Search

Enter YYYYTT (i.e.: 1998FA)

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

TT is the term

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

Restricted lookup by Topic Code

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

Restricted lookup for open sections

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

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Record Search Overview

Responsibility: University

LookUp Selection Options

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

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

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

Valid operands are:

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

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Record Lookup

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

Person/Organization Lookup

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

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

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

IF YOU HAVE NO MATCH:

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

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IF YOU HAVE A NAME WITH UNUSUAL SPELLINGS:

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

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

**** POINTS TO REMEMBER ****

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

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

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

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

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

Other Records Lookup

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

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

Individual and Corporation Record Relationship

****CAUTION****

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

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

- Click OK to release the warning message.

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

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

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Flagging records on a resolution screen

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

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Using a savedlist to process large numbers of records

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

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Setup for Residential Life

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Defining Residence Life Defaults

Responsibility – Res Life Group

Use the Residence Life Parameter Def (RLPD) screen to define housing parameters. With this set up, the box number will show on the ADSU screen.

Step 1 – Access the Residence Life Parameter Def (RLPD) screen

Step 2 – Define the following:

File Types for Housing.....: 1: APPLICANTS
2: STUDENTS
Housing Assignment Inquiry.....: Yes
Default Room Assignment Status.....: A Assigned
Assign Room Assignment Lottery No.: Yes
Room Assignment Lottery No.....: 3
Room Assignment Notice Comm Code...:
Create Address Per Room Assignment.: Yes
Assignment Address Type.....: DRM Residence Hall
Build Box Address From.....: B Building
Preferred Mailing Address.....: Yes
Preferred Residence.....: No
Institution Address.....: 1:
CSZ.....:

Step 3 – Update the RLPD screen

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Defining Room Charge Refund Formulas

Responsibility - AR Group

Complete the following steps to define refund formulas for room charges:

Step 1 - Read *Using Accounts Receivable/Cash Receipts* to understand how Colleague calculates refunds for room charges.

Step 2 - Determine how many different refund formulas you will need to cover room charges.

Step 3 - Define each refund formula.

- If you are also defining refund formulas for registration charges and meal plan charges, you might want to complete this step for all refunds, to ensure that wherever there is duplication you only define one formula.

Step 4 - Define any rules you will need for assigning room assignment refund formulas.

- See “Using Rules with Room & Meal Plan Refund Formulas”.
- See “Understanding the Rules Processor”.

Step 5 - Use the Refund Formula (REFF) screen to enter each refund formula. Define the following for each formula.

Description

- Enter a description

Count Section Meeting:

- Enter [Y] to count section meeting days in a registration refund

Days Excluded

- Enter the days to exclude from a registration refund
- For example, HO for Holidays

Days Before Start, Refund Pct, Cancel Charge

- Enter the number of days before the use was to have actually started
- Enter the percent of the billing amount to be refunded

Note: Only Days Used or Pct Used can be populated. They both can not.

Days Used, Refund Pct, Refund Portion, Cancel Charge

- Enter the number of days the refund percent is valid
- Enter the percentage used to calculate a refund due

Pct Used, Refund Pct, Refund Portion, Cancel Charge

- Enter the percentage of the full amount billed used to calculate a refund
- Enter the percentage used to calculate a refund due
- Enter the portion of the billing amount used to calculate a refund

Comments

- Insert a line so the latest comment is at the top
- Date and time stamp first, then

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- Enter a comment

Step 6 - Use the Rule Definition (RLDE) screen to enter each refund rule.

Step 7 - Access the Room Billing Parameters (RMBP) screen.

Step 8 - Enter the default refund formula in the Default Refund Formula field.

Step 9 - If you use additional refund formulas based on rules, enter the rules and the associated refund formula in the Refund Rules field.

- You can access the Rules Definition (RLDE) screen from the Refund Rule field if you have not already entered the necessary rules.

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Defining Meal Plan Charge Refund Formulas

Responsibility - AR Set up

Complete the following steps to define refund formulas for meal plan charges:

Step 1 - Read *Using Accounts Receivable/Cash Receipts* to understand how Colleague calculates refunds for room charges.

Step 2 - Determine how many different refund formulas you will need to cover meal plan charges.

Step 3 - Define each refund formula.

- If you are also defining refund formulas for registration charges and room charges, you might want to complete this step for all refunds, to ensure that wherever there is duplication you only define one formula.

Step 4 - Define any rules you will need for assigning meal plan refund formulas.

- See “Using Rules with Room & Meal Plan Refund Formulas”.
- See “Understanding the Rules Processor”.

Step 5 - Use the Refund Formula (REFF) screen to enter each refund formula. Define the following for each formula.

Description

- Enter a description

Count Section Meeting:

- Enter [Y] to count section meeting days in a registration refund

Days Excluded

- Enter the days to exclude from a registration refund
- For example, HO for Holidays

Days Before Start, Refund Pct, Cancel Charge

- Enter the number of days before the use was to have actually started
- Enter the percent of the billing amount to be refunded

Note: Only Days Used or Pct Used can be populated. They both can not.

Days Used, Refund Pct, Refund Portion, Cancel Charge

- Enter the number of days the refund percent is valid
- Enter the percentage used to calculate a refund due

Pct Used , Refund Pct, Refund Portion, Cancel Charge

- Enter the percentage of the full amount billed used to calculate a refund
- Enter the percentage used to calculate a refund due
- Enter the portion of the billing amount used to calculate a refund

Comments

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

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Step 6 - Use the Rule Definition (RLDE) screen to enter each refund rule.

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Using Residential Life

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Recording Preferences

Responsibility – South Dakota does not use

Timeframe: Prior to the start of the semester

Use Room Preferences (RMPR) screen to record an individual's room preferences.

Step 1 – Access the Room Preferences (RMPR) screen for the individual

- If no preferences exist, a Do you want to add one? Prompt is displayed.
- Enter Y to add a preference

Step 2 – Enter the Start/End date of when the preference takes effect

Step 3 – Enter the Preferred Building, Room, Wing, Floor

- Enter Y/N if the individual requires this preference

Step 4 – Enter the Preferred Floor

- Enter Y/N if the individual requires this preference
- This will not link a floor to a building

Step 5 – Enter the Preferred Room Characteristics

- Enter Y/N if the individual requires this preference

Step 6 – Enter the Preferred Roommate Characteristics

- Enter Y/N if the individual requires this preference

Step 7 – Enter the Preferred Roommates

- Enter Y/N if the individual requires this preference

Step 8 – Update the RMPR screen

South Dakota Colleague System Procedures

Recording Room Requests

Responsibility – South Dakota does not use

Timeframe: Prior to the start of the semester

Use Room Request (RREQ) screen to record an individual's room requests and preferences information.

Step 1 – Access the Room Request (RREQ) screen for the individual

- If there is no assigned room request, the following prompt displays:
 - There are no unassigned room requests for this person. Add one (Y/N)?:
 - Enter Y to add one.
 - The following prompt displays:
 - Would you like to specify Room Preferences (Y/N)?
 - Enter Y to specify Room Preferences

Step 2 – Enter the Term for the Room Request

Step 3 – Enter the Start/End dates for when the preferences are in effect

Step 4 – Define the Status/Date

- Enter the status of the room assignment
 - R Reserved
 - A Assigned
 - C Cancelled
 - T Terminated
 - L Late Assignment
 - WL Waitlisted, but Assigned
 - M Moved

Step 5 – Define the Lottery Number

- Use this field to indicate the lottery number that corresponds to this room assignment.
- The lottery number is used by the procedure that automatically assigns a room to an individual.
- Once the room assignment has been made, the lottery number is no longer used.

Step 6 – Enter the Room Rate Table and AR Code

Step 7 – Define the Rate Period

- Enter T for term

Step 8 – Enter any Addnl Terms this room is requested for

Step 9 – If you entered Y to specify Room Preferences, enter the Building, Room, Wing or Floor and whether the preference is required.

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Step 10 – Enter the Preferred Floor

- Enter Y/N if the individual requires this preference
- This will not link a floor to a building

Step 11 – Enter the Preferred Room Characteristics

- Enter Y/N if the individual requires this preference

Step 12 – Enter the Preferred Roommate Characteristics

- Enter Y/N if the individual requires this preference

Step 13 – Enter the Preferred Roommates

- Enter Y/N if the individual requires this preference

Step 14 – Update the RREQ screen

South Dakota Colleague System Procedures

Assigning Director of Residence Halls and Individual Hall Directors

Recording Director of Residence Halls and Individual Hall Directors

Responsibility – Home

Use the Room Assignment (RMAS) screen to record the status of Residence Hall Director and Individual Hall Directors. This assignment is necessary so they can be extracted for Starfish.

Step 1 – Access the Room Assignment (RMAS) screen

Step 2 – At the person prompt, use the look up function to locate the person record

Step 3 – Enter term

- Do not enter a term for a Director of Residence Halls
- Enter the term of their contract for an individual Hall Director

Step 4 – Enter Start/End date

- When the term field is populated, default start and end dates will populate this field for an individual Hall Director
- Start date for a Director of Residence Halls is the date they accepted that position
- End date for a Director of Residence Halls is the future date of July 1, 2029

Step 5 – Enter the Res Staff Indic

- Enter RD for Resident Director or Hall Director who should be assigned the Res Life 1 role in Starfish (Res Life 1 role is able to view flags and report on them)
- Enter O (Other) for Hall Director who should be assigned the Res Life 2 role in Starfish (Res Life 2 role has broader security access and can manage flags, alerts, etc. in Starfish)

Step 6 – Enter the building/room info

- For an individual Hall Director, the building id will be the hall they are the Director of. It is possible that an individual Hall Director could already be assigned to a room in that hall for that term – if so, verify that the Res Staff Indic is set to RD (Residence Director)
- For the Director of Residence Halls, the building id will be any one of the halls they oversee on campus. Do not enter room information, ie leave that field blank.

Step 7 – Enter comments, if applicable

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- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 8 – Update the RMAS screen.

- You may get the message “This room has no box number and the person has no campus box number”. Click on OK.
- You may get the message “WARNING: Billing information incomplete. No charges will be posted”. Click on OK.
- You may get the message “Room assignment cannot be billed without a room rate table”. Click on OK.
- After you click on Update, you may get the message (again) “Room assignment cannot be billed without a room rate table”. Click on OK.

South Dakota Colleague System Procedures

Ending Director of Residence Halls and Individual Hall Directors Assignments

Ending Director of Residence Halls and individual Hall Director Assignments

Responsibility – Home

If the employee was a Director of Residence Halls:

Step 1 – Access the Room Assignment (RMAS) screen.

Step 2 – At the person prompt, use the look up function to locate their record

Step 3 - Update the End date with their last day of service in that position.

Step 4 – Enter T (Terminated) and the date of their last day of service for Status/Date.

Step 5 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 6 – Update the RMAS screen.

If the employee was a(n individual) Residence Hall Director:

Step 1 – Access the Room Assignment (RMAS) screen.

Step 2 – At the person prompt, use the look up function to locate their record

Step 3 - Update the End date with their last day of service in that position IF they did not complete the entire term of their hall assignment.

Step 4 – Enter T (Terminated) and the date of their last day of service for Status/Date IF they did not complete the entire term of their hall assignment.

- You may leave the A (active) status already populated in this field alone if they did complete the entire term of their hall assignment.

Step 5 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 6 – Update the RMAS screen.

South Dakota Colleague System Procedures

Assigning Housing to an Individual

Responsibility – Home

Timeframe: Prior to the start of the semester

Pending Issue – Problem with the refund policy not calculating the correct amount.

Problem with rounding errors as students switch between rooms

Use the Room Assignment (RMAS) screen to assign housing to an individual.

Note: RMAS.AR.POSTED.FLAG in the ROOM.ASSIGNMENTS file should be set to “Yes”. Then running BILL should do nothing to change the previously billed rooms. In addition, the effective date on RRTP could be set so it is for the new room assignments after conversion only. If there were changes to previous room assignments, they would need to be done manually.

Step 1 – Access the Room Assignment (RMAS) screen

Step 2 – At the person prompt, use the look up function to locate the person record

Step 3 – Enter the term and contract number

- If this assignment is for future terms, enter those terms in the future terms field
- Enter the contract number for future terms

Step 4 – Enter the status and date of this assignment

- R – reserved
- A – assigned
- C – canceled
- T – terminated
- L – late assignment

(Note: some universities will use status A for Assign instead of L even if the semester has already started if the student is moving into a room up until the last day to add a class. Check with your university’s housing department to determine if your university would still use the A after the semester started up until a certain timeframe.)

- WL – waitlisted but not assigned
- M – moved

Step 5 – Detail on the Preferences field to view student preferences (not used)

Step 6 – Enter the building/room that this student is assigned to

- Buildings are smart coded

Step 7 – Enter the Room Rate Table

- Room Rate Tables are smart coded

Step 8 – Enter the Rate Period/Rate

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- The rate period is how often the assignment is billed (daily, weekly)
- You must enter a rate period to create a room assignment record.
- If the room rate is overridden, enter the override rate in the Ovr Rate field and enter a reason for the override

Step 9 – Ovr Rate/Reason

- If the room rate is overridden, enter the override rate in the Ovr Rate field and enter a reason for the override.

Step 10 - Detail on Addnl Chrg/Cr to define any additional charges/credits

Step 11 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 12 – Detail on the Bill Override field to change the billing parameters for a room assignment

Step 13 – Detail on Meal Plans to assign/view a meal plan

Step 14 – Detail on Other Info to view demographic information about the student

Step 15 – Enter a box number – This will populate

Step 16 – Update the RMAS screen

South Dakota Colleague System Procedures

Viewing an Individual's Plan Assignments

Responsibility – Home

Use the Current Res Life Inq (RLAI) screen to view an individual's room and meal plan assignments concurrently.

Step 1 – Access the Current Residence Life Inq (RLAI) screen for the individual

Step 2 – The current room and meal plans display

Step 3 – To view detailed information about an individual's current room assignment

- access the Room Assignment (RMAS) by detailing from the Room field

Step 4 – To assign a meal plan or view detailed information about an existing meal plan assignment

- access the Meal Plan Assignment (MPAS) screen by detailing from the Meal Plan field
- See Assigning a Meal Plan to an Individual

Step 5 – To view detailed emergency information about the individual

- access the Emergency Information (EMER) screen by detailing from the Emergency Info field.

Step 6 – To view demographic information about the individual

- access the Biographics (BIO) screen,
- the Addresses (ADR) screen,
- the Name and Address Entry (NAE) screen.

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Viewing a Summary of an Individual's Room Assignments

Responsibility – Home

Use the Room Assignment Summary (RSUM) screen to view a summary of an individual's housing assignments.

Step 1 – Access the Room Assignment Summary (RSUM) screen for the individual

Step 2 – Enter the Start Date or Term at the LookUp

Step 3 – The Room Assignments are displayed for that timeframe

Step 4 – Detail on the Term to access the Room Assignment (RMAS) screen

- See Assigning Housing to an Individual

Step 5 – Detail on the Meal Plan Assign to access the Meal Plan Assignment (MPAS) screen

- See Assigning a Meal Plan to an Individual

Step 6 – Detail on Demographics to access either the Biographical Information (BIO) screen, Address Summary (ADSU) screen, or Name and Address Entry (NAE) screen

- See Adding a Person or Changing an Address Record

South Dakota Colleague System Procedures

Batch Importing Housing Assignments (initial and changes)

Responsibility – Home

Timeframe – as needed/requested

Step 1 – Access the Import Room Assignment (XRRRA) screen

Step 2 – Enter your Room Assignment Source File to import

Step 3 – Enter Y to Update, or N to run in nonupdate mode

Step 4 – Update the XRRRA screen

South Dakota Colleague System Procedures

Changing a Housing Assignment

Responsibility – Home

Timeframe – as needed/requested

Pending Issue – Problem with the refund policy not calculating the correct amount.

Problem with rounding errors as students switch between rooms

Use the Room Assignment (RMAS) screen to assign housing to an individual

Step 1 – Access the Room Assignment (RMAS) screen

Step 2 – At the person prompt, use the look up function to locate the person record

Step 3 – At the room lookup, select the room assignment you wish to change

Step 4 – If the change is before or on the first day of the semester, then:

- Overwrite the current bldg/room value
- Overwrite the current Room Rate Table value if different
- Skip to step 7 then stop after step 8

If the change is after the first day of the semester then you will need to end the current assignment then add a new assignment:

- Proceed to step 5

Step 5 – Enter a status of M (for moved) in the Status/Date field

Step 6 – Enter the date they checked out of the room in the Status/Date field

Step 7 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 8 – Update the RMAS screen

Step 9 – Create the new room assignment via RMAS. For those steps, see section titled “Assigning Housing to an Individual”

South Dakota Colleague System Procedures

Ending a Housing Assignment

Responsibility – Home

Timeframe – as needed/requested

Step 1 – Access the Room Assignment (RMAS) screen

Step 2 – At the person prompt, use the look up function to locate the person record

Step 3 – At the room lookup, select the room assignment you wish to cancel or terminate

Step 4 – Enter the status and date of the cancellation/termination in the Status/Date field

- C – cancelled (use this status if they never checked into the room)
- T – terminated (use this status if they checked into the room)

Step 5 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 6 – Update the RMAS screen

South Dakota Colleague System Procedures

Assigning a Meal Plan to an Individual

Responsibility – Home

Timeframe: Prior to billing

Use the Meal Plan Assignment (MPAS) screen to assign a meal plan to an individual.

Step 1 – Access the Meal Plan Assignment (MPAS) screen

Step 2 – At the person prompt, locate the student you are assigning the meal plan to.

Step 3 – If a meal plan does not exist, a prompt asks if you would like to assign one.

- Enter Y to assign a meal plan
- Enter the name of the smart coded meal plan

Note: Detail on the Meal Plan field to view the actual plan.

Step 4 – Enter the term

- If this meal plan is being assigned for multiple terms, enter the terms in the future terms field

Step 5 – Enter the status and date of the meal plan

- A – assigned
- C – canceled
- T – terminated
 - If you terminate a meal plan, the information in either units used or the Percent Used field is required. Colleague subtracts the number you enter in this field from the total rate periods. The resultant number is then multiplied by the rate to obtain the amount of refund.
- L – late assignment
- R – refund

Step 6 – Enter a meal card number, if applicable

Step 7 – Enter any applicable comments

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 8 – Detail on the billing override field to override billing rates, if applicable

Step 9 – Update the MPAS screen

South Dakota Colleague System Procedures

Batch Importing Meal Plans (initial and changes)

Responsibility – Home

Timeframe – as needed/requested

Step 1 – Access the Import StarRez Meal Plan (XRMP) screen

Step 2 – Enter your Meal Plan Source File to import

Step 3 – Enter Y to Update, or N to run in nonupdate mode

Step 4 – Update the XRMP screen

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Changing a Meal Plan Assignment

Responsibility – Home

Timeframe – as needed/requested

Step 1 – Access the Meal Plan Assignment (MPAS) screen

Step 2 – At the person prompt, use the look up function to locate the person record

Step 3 – At the meal plan lookup, select the meal plan assignment you wish to change

Step 4 – Overwrite the meal plan code with the new meal plan code

Step 5 – Enter today's date in the Status date field

Step 6 – Enter comments, if applicable

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 7 – Update the MPAS screen

South Dakota Colleague System Procedures

Ending a Meal Plan Assignment

a) Ending a Meal Plan Assignment (If the student has not used any portion of their meal plan)

****If the student has used any part of their meal plan, see the section immediately following for instructions to end a meal plan assignment when any portion of it has been used.**

Responsibility – Home

Timeframe – as needed/requested

Use the Meal Plan Assignment (MPAS) screen to assign, change and cancel a meal plan for an individual.

Step 1 – Access the Meal Plan Assignment (MPAS) screen

Step 2 – At the person prompt, locate the student you are assigning the meal plan to

Step 3 – At the meal plan prompt, select the meal plan you are cancelling

Step 4 – Enter the status of C and date of the meal plan cancellation

- C – cancelled (use this status if the student never used this plan)

Step 5 – Enter any applicable comments

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 6 – Update the MPAS screen

b) Ending a Meal Plan Assignment (If the student used any portion of their meal plan)

****If the student has not used any portion of their meal plan, see the section immediately preceding for instructions to end a meal plan assignment when no portion of it has been used.**

Responsibility – Home

Timeframe – as needed/requested

Use the Meal Plan Assignment (MPAS) screen to assign, change and cancel a meal plan for an individual.

Step 1 – Access the Meal Plan Assignment (MPAS) screen

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Step 2 – At the person prompt, locate the student you are assigning the meal plan to

Step 3 – At the meal plan prompt, select the meal plan you are cancelling

Step 4 – Leave the status and date of the meal plan as is, ie do not change.

Step 5 – Detail on the “Billing Override” field at the bottom of the MPAS screen which will bring up the MPLB screen. Override the amount with a pro-rated replacement amount the student should be charged according to your university’s policy.

Step 6 – Enter any applicable comments

- Insert a line so the latest comment is at the top
- Date and time stamp first, then
- Enter a comment

Step 7 – Update the MPAS screen

South Dakota Colleague System Procedures

Printing Mailing Labels for Meal Plan Assignments

Responsibility – Home

Use the Meal Plan Assignment Labels (MPLA) screen, shown below, to print mailing labels for people with meal plan assignments.

Step 1 – Access the Meal Plan Assignment Labels (MPLA) screen

Step 2 - On the upper half of the MPLA screen, define the format, print location, options for updating institution records, and other options.

- **Form Name and Form—**
 - These fields have similar names but are unrelated.
 - In the Form Name field, you enter the name of the record in the Form file which defines the format for the labels.
 - The MEAL.PLAN.LABELS record, delivered with the Colleague software, is the default.
 - You can modify the format by accessing that record on the Form Definition (FORM) screen.
 - In the Form field, you can specify the printer form, if required at your institution in order to print the labels at a certain printer.
- **Postal Sort Class**
- **Activity to date**
 - The activity you enter here will be updated with the name of the label form used, today's date, and the number of labels created.
- **Update Mailing History**
 - Default is no
- **Detail to define Name and Address Hierarchy**

Step 3 - On the lower half of the MPLA screen, limit the mailing labels to certain addressees.

- In the Saved List Name field, you can specify a saved list of people with meal plan assignments from the MEAL.PLAN.ASSIGNMENT file.
- You can also limit the list of addressees to those with meal plan assignments during certain time periods (in the Assignment Date Begin and End fields) or certain terms (in the Terms field), and to those assigned to certain meal plans (in the Meal Plans field).
- In the Include Statuses and Exclude Statuses fields, you can limit the addressees to those with certain meal plan assignment statuses. For example, you could include only meal plan assignments with an “assigned” status or exclude all meal plan assignments with a “cancelled” status.
- You can also limit the list of addressees by zip code using either the Zip Code or Zip Codes field.
 - You can specify a *range* of zip codes in the Zip Code Begin and End fields.

South Dakota Colleague System Procedures

- Alternatively, you can specify one or more *specific* zip codes in the multi-valued Zip Codes field.
- You can specify zip codes in either the Zip Code field or the Zip Codes field, but not both.
- To use other criteria to further limit the addressees, enter **Yes** in the Additional Selection Criteria field and specify the criteria on the Additional Selection Criteria screen.

Step 4 – Update the MPLA screen

South Dakota Colleague System Procedures

Printing Meal Plan Assignment Notices

Responsibility – Home

From the Meal Plan Assignment Notice (MEAL) screen, you can print notices which you can mail to students to notify them of their meal plan assignments.

Note: Colleague prints notices for meal plan assignments that do not have a status of “cancelled” or “terminated.”

Step 1 – Access the Meal Plan Assignment Notice (MEAL) screen

Step 2 – Define the Print Parameters on the top half of the screen

- Enter a Name/Address Hierarchy
- Enter any mail rules for additional copies, if applicable
- Enter the sort sequence you prefer for the notices
 - For example, name or zip

Step 3 - Limit the meal plan assignments for which notices are printed by specifying a saved list and/or other criteria in the lower half of the MEAL screen.

- **Saved List Name—**
 - You can limit the meal plan assignments for which notices are printed by specifying a saved list of records from the MEAL.PLAN.ASSIGNMENT file.
- **Date Range and Term—**
 - Use these fields to limit the time period or terms for which notices are printed.
 - You must enter either a date range or term, but you cannot enter both.
 - If you enter a date range, you can enter both begin and end dates, or just the begin date, or just the end date.
- **Additional Selection Criteria**

Step 4 – Update the MEAL screen

South Dakota Colleague System Procedures

Viewing an Individual's Meal Plan Summary

Responsibility – Home

Use the Meal Plan Summary (MPSM) screen to view a summary of an individual's meal plan assignments.

Step 1 – Access the Meal Plan Summary (MPSM) screen for the individual

Step 2 – The Meal Plan Summary is displayed

Step 3 – Detail on the Meal Plan to view the Meal Plan Assignment (MPAS) screen

- See Assigning a Meal Plan to an Individual

South Dakota Colleague System Procedures

Processing Other Housing-Related Charges and Credits

Responsibility – Home

Timeframe: Prior to billing

You can process other charges related to the room assignment using the Additional AR Code group.

You can enter the AR code, a description of the charge or credit, and the amount in the fields provided, or you can detail on RMAS to the Additional Chrgs/Credits (ARCG) screen to complete the information.

All charges and credits will be included in the calculation of the housing assignment totals when you update the record.

Step 1 – Access the Additional Room Chrgs/Credits (ARCG) screen from the main menu or detail in the Additional Chrgs/Credits field on RMAS.

Step 2 – Enter the AR code for this additional charge/credit

Step 3 – Enter a description

Step 4 – Enter the charge or credit

Step 5 – Update the ARCG screen

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Appendix

South Dakota Colleague System Procedures

Generating a Residence Room Availability Report

Responsibility – Home

Use the Residence Room Availability (RRAV) screen to print a report of room vacancies and (optionally) information on residents already assigned to rooms.

You can specify the content and format of the report in the upper half of the screen. In the lower half of the screen, you can limit the rooms included in the report by specifying a saved list of records from the ROOMS file, or by specifying other limiting criteria in the other fields on the lower half of the screen.

Step 1 – Access the Residence Room Availability (RRAV) screen

Step 2 – Enter Y/N to print Double-Space

Step 3 – Enter Y/N to Print Resident Info or Print Vacancies Only

- These fields tell Colleague whether to include information about residents already assigned to rooms. The options are:
 - If you enter **Yes** in the Print Vacancies Only field, the report will only identify room vacancies and will print no information about residents already assigned to rooms.
 - Colleague will ignore the entry in the Print Resident Info field.
- If you enter **No** in the Print Vacancies Only field, the report will identify room vacancies and also print information about residents already assigned to rooms.
 - This information will consist of only the name (if you enter **No** in the Print Resident Info field) or the name plus other information including academic program, academic level, and class (if you enter **Yes** in the Print Resident Info field).

Step 4 – Limit the rooms included in the report by specifying a saved list of records from the ROOMS file, or by specifying other limiting criteria such as:

- Assignment Dates—
 - You must enter dates in both the Begin and End fields.
- Building/Room Types
- Buildings/Wings/Floors

Step 5 – Update the RRAV screen

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Printing Room Assignment Notices

Responsibility – Home

From the Residence Room Assignment Rpt (RRAS) screen, you can print notices which you can mail to students to notify them of their room assignments.

When you run the RRAS report, even with no limiting criteria defined in the lower half of the screen, Colleague only prints notices for room assignments that are not cancelled or terminated, and that have not been previously printed.

- You can further limit the room assignments for which notices are printed by specifying a saved list and/or other criteria in the lower half of the RRAS screen.
- In the upper half of the screen, you can specify the information included on the notices, the format of the notices, and whether this notice is posted to the Communications Management module.

Step 1 – Access the Residence Room Assignment Rpt (RRAS) screen

Step 2 – Define the Name/Address Hierarchy

Step 3 – Define the Contact Information

- You can identify the person whom students should contact if they have questions about their notice.

Step 4 – Define the Comm Code/Status/Date

Step 5 – Define the Sort Sequence

- ID Identification Number
- ZIP Zip Code
- NAME Sort Name
- PRESORTED Presorted SavedList

Step 6 – Enter Y/N to Print Room Characteristics

Step 7 – Enter Y/N to Print Addnl Billing Info

Step 8 – Enter a Saved List Name

- You can limit the room assignments for which notices are printed by specifying a saved list of records from the ROOM.ASSIGNMENT file.

Step 9 – Define the Date and Term—

- On the RRAS screen, the Date fields (Begin and End) are independent of the Term field.
- If you specify dates in the Begin and End fields, Colleague limits the selected room assignments to those which occur completely within that range, using the

South Dakota Colleague System Procedures

dates specified in the Start/End Date field on the Room Assignment (RMAS) screen.

- If you specify a term in the Term field, Colleague selects room assignments with that term, as specified in the Term field on the RMAS screen.

Step 10 – Further limit the rooms by defining the following:

- Locations
- Buildings
- Assignment Statuses
- Assignees
- Additional Selection Criteria

Step 11 – Update the RRAS screen

South Dakota Colleague System Procedures

Printing Mailing Labels for Room Assignments

Responsibility – Home

Use the Room Assignment Labels (RMLA) screen, shown below, to print mailing labels for people with room assignments.

Step 1 – Access the Room Assignment Labels (RMLA) screen

Step 2 - On the upper half of the RMLA screen, define the format, print location, options for updating institution records, and other options.

- **Form Name and Form—**
 - These fields have similar names but are unrelated.
 - In the Form Name field, you enter the name of the record in the Form file which defines the format for the labels.
 - The ROOM.ASSIGN.LABELS record, delivered with the Colleague software, is the default.
 - You can modify the format by accessing that record on the Form Definition (FORM) screen.
 - In the Form field, you can specify the printer form, if required at your institution in order to print the labels at a certain printer.
- **Postal Sort Class**
- **Activity to Update**
 - The activity you enter here will be updated with the name of the label form used, today's date, and the number of labels created.
- **Update Mailing History**
 - Default is No
- **Detail to define Name/Address Hierarchy**

Step 3 - On the lower half of the RMLA screen, limit the mailing labels to certain addressees.

- In the Saved List Name field, you can specify a saved list of people with room assignments from the ROOM.ASSIGNMENT file.
- You can also limit the list of addressees to those with room assignments during certain time periods (in the Assignment Date Begin and End fields) or certain terms (in the Terms field), and to those assigned to rooms in certain buildings (in the Buildings field).
- In the Include Statuses and Exclude Statuses fields, you can limit the addressees to those with certain room assignment statuses.
 - For example, you could include only room assignments with an “assigned” status or exclude all room assignments with a “cancelled” status.
- You can also limit the list of addressees by zip code using either the Zip Code or Zip Codes field.
 - You can specify a *range* of zip codes in the Zip Code Begin and End fields.

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- Alternatively, you can specify one or more *specific* zip codes in the multi-valued Zip Codes field.
- You can specify zip codes in either the Zip Code field or the Zip Codes field, but not both.
- To use other criteria to further limit the addressees, enter **Yes** in the Additional Selection Criteria field and specify the criteria on the Additional Selection Criteria screen.

Step 4 – Update the RMLA screen

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Generating a Report of Room Assignments

You can print a report of room assignments from the Room Assignment/Student Load (RASL) screen.

You can enter information in the fields on the RASL screen if you want to limit the room assignments included in the report. However, none of the fields are required.

Step 1 – Access the Room Assignment/Student Load (RASL) screen

Step 2 – Define the room assignments you would like to view on the report by:

- **Using a Saved List Name—**
 - You can enter the name of a saved list of records from the ROOM.ASSIGNMENT file.
- **Entering term**
- **Entering Building Types**
- **Incl Room Assignment Statuses and Excl Room Assignment Statuses—**
 - You can enter information in one, but not both, of these fields.
- **Entering Student Acad Levels**
- **Entering Student Loads**
- **Incl Student Term Statuses and Excl Student Term Statuses—**
 - You can enter information in one, but not both, of these fields.
- **Defining Additional Selection Criteria**

Step 3 – Update the RASL screen

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