CHAPTER 1

Defining Student Records Installation Settings

This chapter discusses how to review or define Student Record installation settings.

Reviewing or Defining Student Records Installation Settings

To review or define Student Records installation settings, use the Student Records Installation component (SSR_INSTALLATION). This chapter discusses:

- How to review or define Student Records default installation settings.
- How to review or define Enrollment Requirement Roster default installation settings.
- How to review or define Enrollment Requirement Processing default installation settings.

Pages Used to Review or Define Student Records Installation Settings

Page Name	Definition Name	Navigation	Usage
Student Records Installation	SSR_INSTALLATION	Set Up SACR, Install, Student Records Installation, Student Records Installation	Review or define Student Records default installation settings for general options, class searches, and enrollment requirement / requisite checking.
Enrollment Requirement Roster	SSR_INSTALLATION2	Set Up SACR, Install, Student Records Installation, Enrollment Requirement Roster	Review or define default installation settings for the enrollment requirement roster.
Enrollment Requirement Processing	SSR_INSTALLATION3	Set Up SACR, Install, Student Records Installation, Enrollment Requirement Processing	Review or define default installation settings for enrollment requirement processing.

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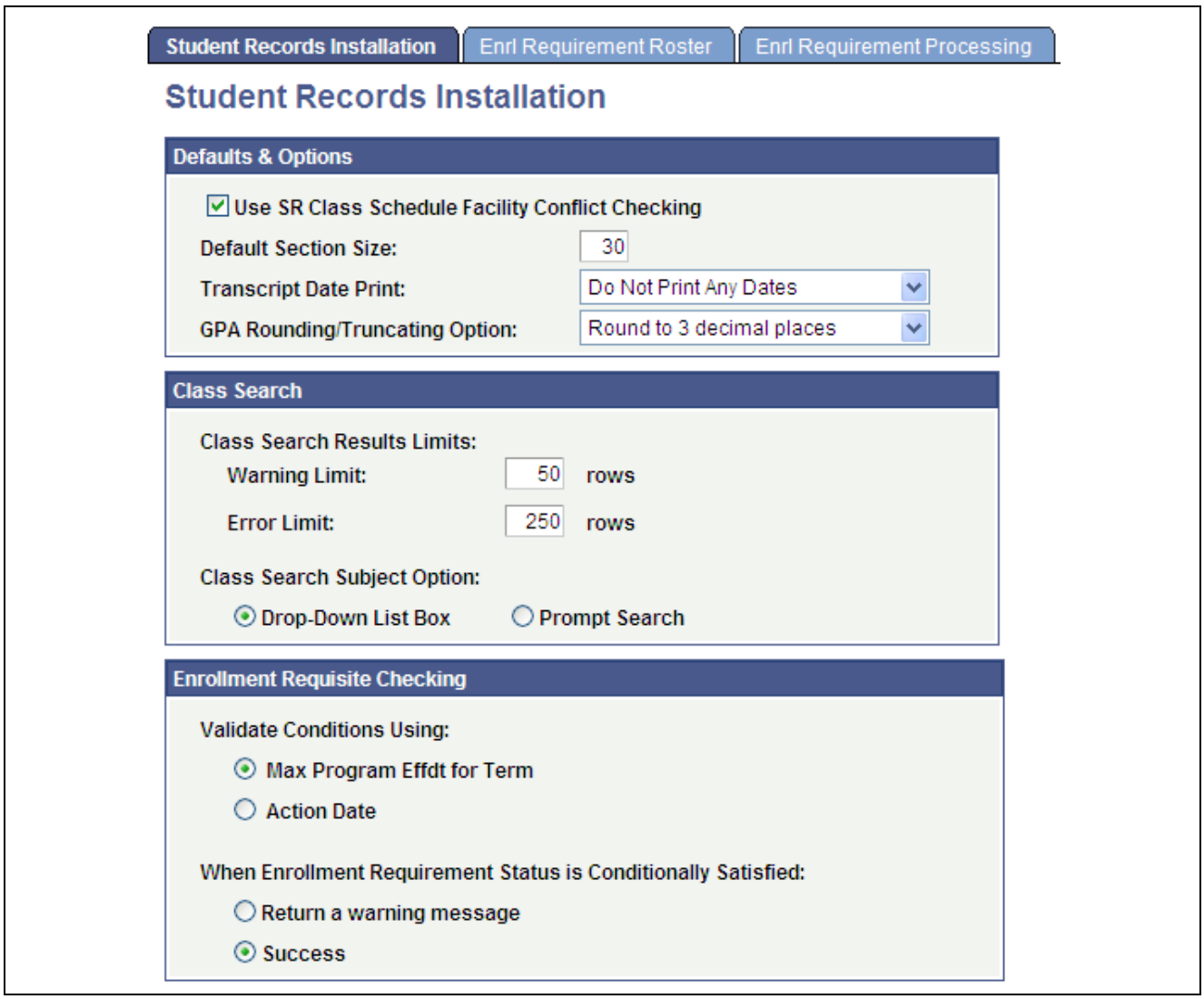
Reviewing or Defining Default Installation Settings

Bundle 29
Documentation about the Administrative Class Details Option group box has been removed from this chapter.
The Show Textbook Detail check box has been replaced by the Textbook Information check box on the new Class Search Configuration component.
For further information, refer to the Preparing for the Course Catalog and Schedule of Classes chapter included in this Student Records Bundle 29 documentation package.

Access the Student Records Installation page (Set Up SACR, Install, Student Records Installation, Student Records Installation).



Student Records Installation page

Defaults & Options

Use SR Class Schedule Facility Conflict Checking

Select to enable facility conflict checking when scheduling classes. The check box value migrates from the Installation page to the Academic Institution 2 page to the Campus Table page. The system uses the value on the Campus

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Table page during processing. Clear this check box on the Campus Table page to use an external facility conflict checking process.

Note. This check box has no relation to the Check for Facility Conflict check box on the Facility Table page, which controls whether you can schedule multiple events in the same facility.

Default Section Size

Enter a number to use as a default for class size. This value is used in the creation of new class sections. The value is originally rolled into the Catalog record when it is created, and then it is used to enter the number by default into the ENRL_CAP field in the CLASS_TBL.

Transcript Date Print

Select the date on which you want the system to print when printing student transcripts. Select a value to be the default value when a row is entered. Select one value per term. Values are:

Print Class Dates: Prints the valid start and end dates for each class on a transcript.

Print Session Dates: Prints the valid start and end dates for a session within a term on a transcript.

Print Term Dates: Prints the valid start and end dates for the term on a transcript.

Do Not Print Any Dates: No dates print on the transcript.

GPA Rounding/Truncating Option (grade point average rounding/truncating option)

Enter a value to indicate the number of decimal places to which you want to round or truncate the grade point average displayed for a student throughout the system. The maximum allowed is three decimal places.

Class Search

Class Search Results Limits

Enter a value in the Warning Limit and Error Limit fields to indicate the number of classes for the system to display when a student searches for a class.

- Warning Limit: When the limit is reached, the student receives a Warning message. The student can continue to the search results or cancel and add additional criteria to narrow the search.
- Error Limit: When the limit is reached, the student receives an Error message requesting that the student specify additional search criteria.

Class Search Subject Option

Select to indicate whether the Course Subject field on the Search for Classes page appears as a drop-down list box or as a select subject button.

Note. Regardless of the option setting, the Course Subject field dynamically changes to a select subject button if the selected institution has more than 300 course subjects.

Enrollment Requisite Checking

Use this group box to select how the requisite checking process validates programs, plans, and subplans for requisites that specify program, plan, or subplan conditions—for example, if a student enrolls in a class for a term and the class has a requisite condition of Plan = BIOCHEM, what is the maximum effective date that a plan of BIOCHEM can have to meet the requisite for that term.

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Validate Conditions Using:

Max Prog Effdt for Term (maximum program effective date for term)

This option is selected by default.

The requisite checking process uses the following logic to establish if a student meets program, plan, or subplan conditions:

- If the enrollment action date is before or equal to the term begin date, use the term begin date to determine the program, plan, or subplan: Find the maximum effective-dated row, where the effective date is before or equal to the term begin date.

  For example, on 05/30/07 a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07. The student's current program is FAU (with an effective date of 01/01/06), but the student has a future-dated program change of 07/01/07 for the LAU program. The student meets the requisite condition because the maximum effective-dated program row (which is before or equal to the term begin date) is for the LAU program.

- If the enrollment action date is after the term begin date and before or equal to the maximum program effective date for Term, use the action date to determine the program, plan, and subplan: Find the maximum effective-dated row where the effective date is before or equal to the enrollment action date.

  For example, on 09/05/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. The student transferred to the LAU program effective 09/02/07. Fall 2007 commences on 08/30/2007 but has a maximum effective for term of 09/14/07. The student therefore meets the requisite condition.

- If the enrollment action date is after the maximum program effective date for term, use the maximum program effective date for term to determine the program, plan, or subplan: Find the maximum effective-dated row where the effective date is before or equal to the maximum program effective date for term.

  For example, on 09/17/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07 but has a maximum program effective date for term of 09/14/07. The student transferred to the LAU program effective 09/15/07. The student does not meet the requisite condition, because FAU, not LAU is the program for which the maximum effective date is before or equal to the maximum effective date for term.

Action Date

The requisite checking process uses the enrollment action date instead of the maximum program effective date for term when the term begin date is reached:

- If the enrollment action date is before or equal to the term begin date, the process uses the same logic as when the Max Program Effdt for Term option is selected.
- If the enrollment action date is after the term begin date, use the enrollment action date to determine program, plan, or subplan: Find the maximum effective-date row where the effective date is before or equal to the enrollment action date.

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For example, on 09/17/07, a student tries to enroll in a Fall 2007 class that has a requisite condition of the LAU program. Fall 2007 commences on 08/30/07 but has a maximum program effective date for term of 09/14/07. The student transferred to the LAU program effective 09/15/07. The student meets the requisite condition because LAU is the program for which the maximum effective date row is before or equal to the enrollment action date.

When Enrollment Requirement Status is Conditionally Satisfied:

Return a warning message When requisite checking uses in-progress courses to satisfy an enrollment requirement, the user receives a warning message indicating that the prerequisite has been met conditionally and that the prerequisite must be satisfied prior to the start of the class.

Success This option is selected by default. When requisite checking uses in-progress courses to satisfy an enrollment requirement, a message of success is returned.

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Setting Up Enrollment Requisites .

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Managing Post Enrollment Requirement Checking.

Reviewing or Defining Enrollment Requirement Roster Default Installation Settings

The Post Enrollment Requirement Checking feature:

- Provides the ability to capture the status of the enrollment requirement check at the time of enrollment (satisfied, conditionally satisfied, overridden, permitted, enrollment component). Enrollments that do not satisfy the requirement are rejected. The feature captures the status for both enrolled and wait listed students.
- Provides the ability for users to re-run the Enrollment Requirement Checking process (where the Enrollment Engine calls Academic Advisement for enrollment requirement evaluation) on enrolled and wait listed classes after in-progress grades have been posted. The capability is delivered in on-line/remote call mode as well as a batch process.
- Includes an administrative component that allows decision makers to identify and view students who are in non-compliance of class enrollment requirements.
- Includes functionality to identify and process students that need to be dropped from classes for non-compliance as a result of post-enrollment requirement checking.
- Through the use of communications, includes functionality to notify students when they have been administratively dropped from a class for non-compliance.

  If you plan to use communications for post enrollment requirement checking, use the instructions in the following document to set up communications and then use the 3Cs process to create and generate the communication:

  See: PERC Communications Setup and Processing.pdf. This document is included in the PERC Documentation Package which is posted to My Oracle Support.
- Includes a batch process to generate reports of students in non-compliance of enrollment requirements.

Access the Enrollment Requirement Roster page (Set Up SACR, Install, Student Records Installation, Enrollment Requirement Roster).

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Student Records Installation | Enrl Requirement Roster | Enrl Requirement Processing

Enrollment Requirement Roster

Collapsible Area Defaults

- [ ] Collapse Course Information group box
- [ ] Collapse Enrollment Requirement group box
- [ ] Collapse Filter group box

Roster and Batch Processing Filter Default Settings

Enrollment Status

Display [x] Enrolled [x] Waitlisted [ ] Dropped

Most Recent Requirement Status

Display students in non-compliance

[x] Not Satisfied [x] Conditionally Satisfied

Display other students

[ ] Enrollment Component [ ] Overridden

[ ] Permitted [ ] Satisfied [ ] Unknown

Drop Review for Batch Processing

- [x] Enrollment Requirement Rosters must be reviewed prior to batch processing of drops

Enrollment Action Reason

When a student is dropped for non-compliance of enrollment requirements, set Drop Action Reason to:

PERC

Additional Student Information for Decision Makers

- [x] Provide link to student Course History
- [x] Provide link to Student Statistics
  - (•) Academics page from Student Services Center
  - ( ) Administrative Term History page

Security

- [ ] Enforce Academic Organization Security

Notes

- [ ] Enable notes to be deleted

Enrollment Requirement Roster page

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Find documentation about the pages that are used to run Post Enrollment Requirement Checking—the Enrollment Requirement Roster page and the Run Post Enrollment Requirement Checking page—in the Managing Post Enrollment Requirement Checking chapter.

Collapsible Area Defaults

Collapse Course Information group box, Collapse Enrollment Requirement group box, and **Collapse Filter group box**

Clear these check boxes if you want course information, enrollment requirement description, and enrollment requirement roster filter to appear expanded by default on the Enrollment Requirement Roster. Select if you want the fields to appear collapsed.

Regardless of this setup, you can expand and collapse the fields on the Enrollment Requirement Roster.

Roster and Batch Processing Filter Default Settings

Enrollment Status

Select the enrollment statuses that you want to appear by default in the Set Filter Options group box on the Enrollment Requirement Roster. You can override the values on that page.

Most Recent Requirement Status: Display Students in non-compliance

Select the enrollment requirement non-compliance statuses that you want to appear by default on the Enrollment Requirement Roster. You can override the values on that page.

Most Recent Requirement Status: Display other students

Select any additional enrollment requirement statuses you want to appear by default on the Enrollment Requirement Roster. You can override the values on that page.

Drop Review for Batch Processing

Enrollment Requirement Rosters must be reviewed prior to batch processing of drops

Select this check box to ensure that an enrollment requirement roster is set to *Review Complete* before batch drop processing occurs. The Review Complete for Batch Drop Processing check box appears on the Enrollment Requirement Roster and the following message appears on the Process Drop Requests for Post Enrollment Requirements batch processing page: *Drops will only be processed for classes where Drop Review is set to Complete.*

Clear this check box if you do not use batch processing of drops or if you do not want to ensure that the enrollment requirement roster is reviewed before batch dropping students for non-compliance. The Review Complete for Batch Drop Processing check box is not available on the Enrollment Requirement Roster and the message does not appear on the batch drop processing page.

Enrollment Action Reason

When a student is dropped for non-compliance of enrollment requirements, set Drop Action Reason to

Define a default drop action reason code value to be used when a student is dropped for non-compliance of enrollment requirements. The value action reason code of *PERC* is delivered but can be changed. The value should be unique. When a class is dropped using the action reason code of *PERC*, the enrollment record is retained regardless of the Academic Calendar date for the drop delete deadline.

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Additional Student Information for Decision Makers

Provide link to student Course History Select this check box to allow decision makers and other users to access student course history from a link on the Enrollment Requirement Roster (the Course History link on the Audit / Information Links tab). Clear the check box to hide the Course History link.

Provide link to Student Statistics Select this check box to allow decision makers and other users to access student academic statistics from a link on the Enrollment Requirement Roster (the Statistics link on the Audit / Information Links tab). Select an option to identify whether the user links to the Academics page (recommended) as used in the Student Services Center or the Administrative Term History page. Clear the check box to hide the Statistics link.

Security

Enforce Academic Organization Security Select this check box to enforce academic organization security within the Enrollment Requirement Roster and related processing.

Notes

Enable notes to be deleted Select this check box to enable notes to be deleted from the Enrollment Requirement Roster: Tracking of Key Transactions & User Notes page. Clear to prevent notes from being deleted.

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Setting Up Enrollment Requisites .

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Managing Post Enrollment Requirement Checking.

Reviewing or Defining Enrollment Requirement Processing Default Installation Settings

Find documentation about the pages that are used to run Post Enrollment Requirement Checking—the Enrollment Requirement Roster page and the Run Post Enrollment Requirement Checking page—in the Managing Post Enrolment Requirement Checking chapter.

Access the Enrollment Requirement Processing page (Set Up SACR, Install, Student Records Installation, Enrollment Requirement Processing).

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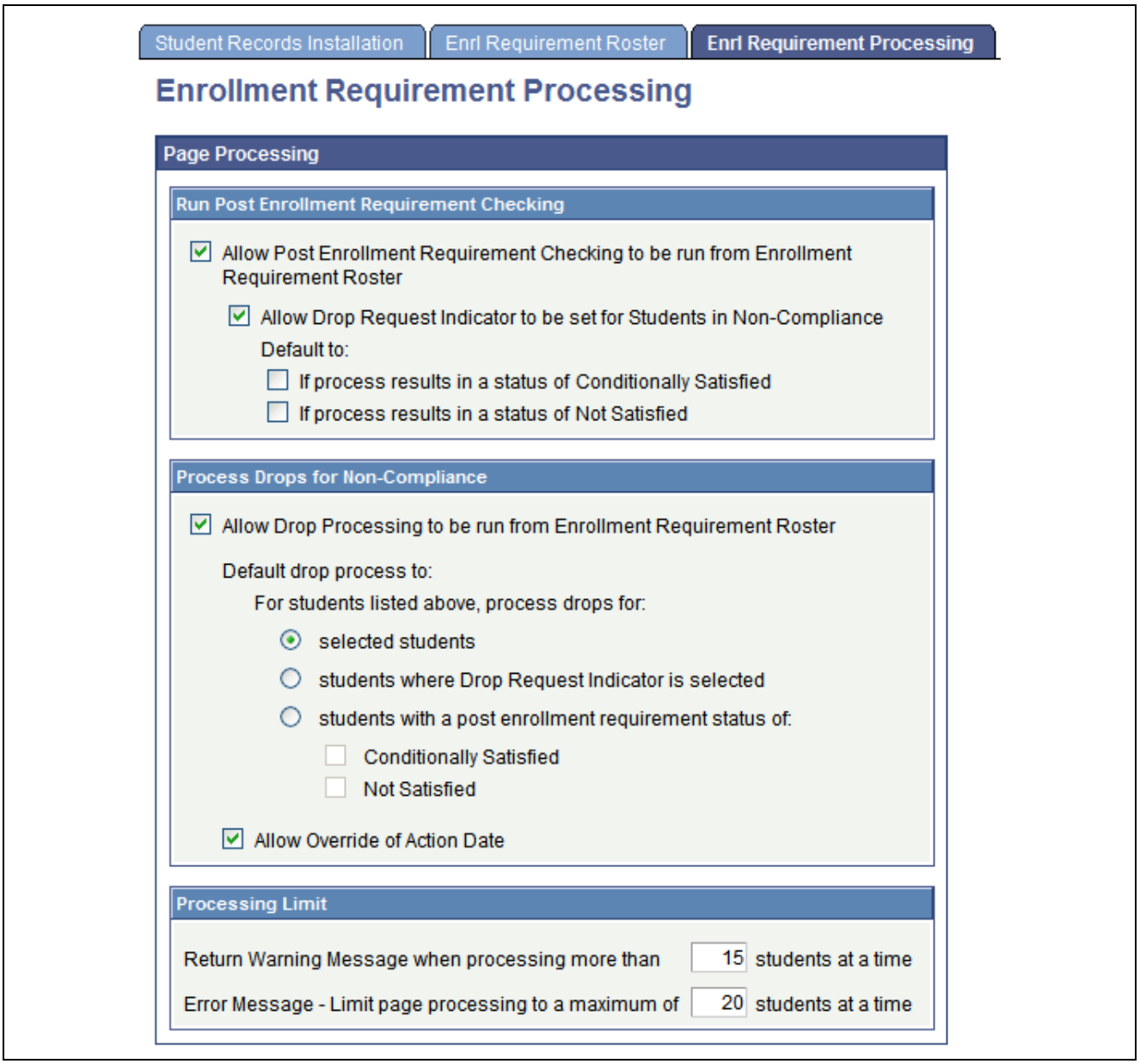

Enrollment Requirement Processing page (1 of 2)

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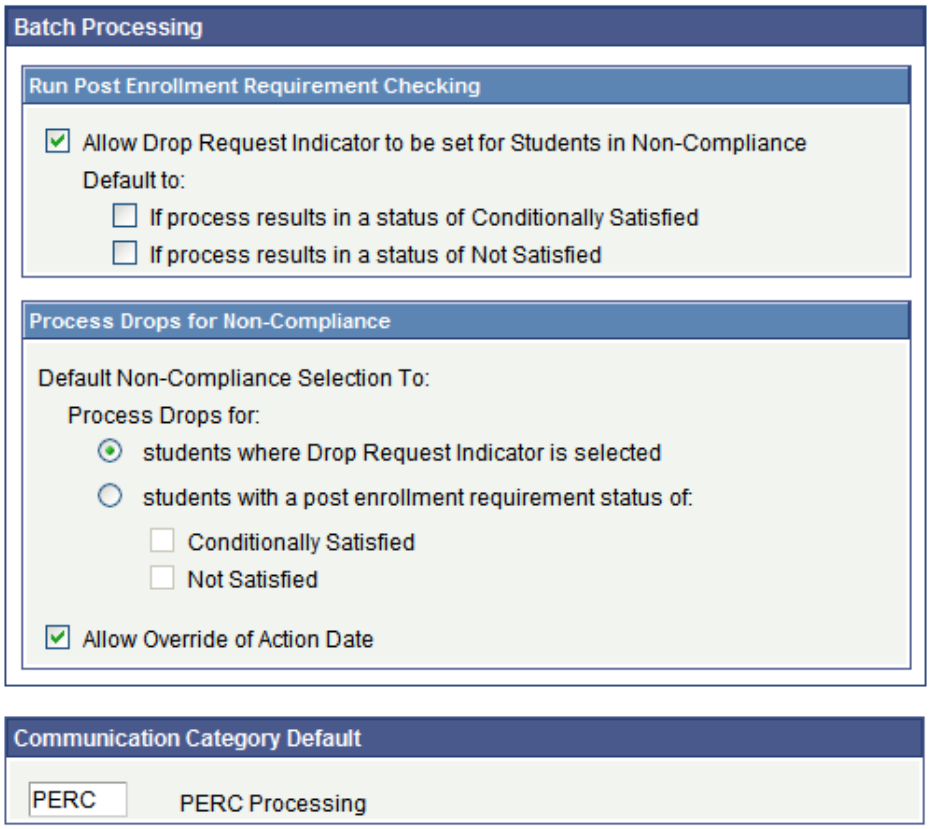

Enrollment Requirement Processing page (2 of 2)

Use the Page Processing group box to select the information and values that you want to appear by default on the Enrollment Requirement Roster.

Page Processing: Run Post Enrollment Requirement Checking

Allow Post Enrollment Requirement Checking to be run from Enrollment Requirement Roster

Select this check box to allow users to run post enrollment requirement checking from the Enrollment Requirement Roster. If selected, the Run Post Enrollment Requirement Checking group box appears on the roster. If cleared, the group box is not available—users would instead run batch post enrollment requirement checking.

Allow Drop Request Indicator to be set for Students in Non-Compliance

If post enrollment requirement checking is enabled, select this check box to allow the Drop Request Indicator to be set from the Enrollment Requirement Roster processing page: If the check box is selected, the Set Drop Request for Students in Non-Compliance options appear in the Run Post Enrollment Requirement Checking group box on the roster. If the check box is cleared, the options are hidden.

Default to: If process results in a status of Conditionally Satisfied and **Default to: If process results in a status of Not Satisfied**

If you have selected the Allow Drop Request Indicator to be set for Students in Non-Compliance check box, use these check boxes to set the status default settings—Conditionally Satisfied and Not Satisfied—on the Enrollment Requirement Roster.

You can override the values on the Enrollment Requirement Roster.

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Page Processing: Process Drops for Non-Compliance

The check boxes and values that are selected here appear by default on the Enrollment Requirement Roster but can be overridden on that page.

Allow Drop Processing to be run from Enrollment Requirement Roster

Select this check box to allow users to run drop processing from the Enrollment Requirement Roster. If selected, the Process Drops for Non-Compliance group box appears on the roster page. If cleared, the group box is not available—users would instead run batch drop processing.

Default drop process to:

If drop processing is enabled from the Enrollment Requirement Roster, define the default selection to:

- selected students: The drop process is run only for selected students.
- students where Drop Request Indicator is selected: The drop process is run only for students for whom the Drop Request Indicator value is selected.
- students with a post enrollment requirement status of: The drop process is run only for students with a post enrollment requirement status of either *Conditionally Satisfied* or *Not Satisfied.* When this option is selected, the Conditionally Satisfied and Not Satisfied check boxes become available for selection.

Allow Override of Action Date

If drop processing is enabled from the Enrollment Requirement Roster, select this check box to allow a user to override the action date: the Override Action Date check box is available on the Enrollment Requirement Roster. The user must have enrollment security to override the action date.

Page Processing: Processing Limit

Return Warning Message when processing more than

Set the maximum number of students that can be selected for page processing before receiving a warning message. Our recommendation for a warning message is for 15 students—you therefore receive a warning message when 16 students or more are selected.

Error Message - Limit page processing to a maximum of

Set the maximum number of students that can be selected for page processing before receiving an error message. To assist with response time, use batch Post Enrollment Requirement Checking processing for large numbers of students. Our recommendation for an error message is for 20 students—you therefore receive an error message if 21 or more students are selected.

Batch Processing: Run Post Enrollment Requirement Checking

Allow Drop Request Indicator to be set for Students in Non-Compliance

Select this check box to allow the Post Enrollment Requirement Checking batch process to set the Drop Request Indicator for a student when the process results in a non-compliant status. If you select this check box, the Action group box which contains the Set Drop Request Indicator for Students in Non-Compliance options is available on the Run Post Enrollment Requirement Checking page.

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Default to: If process results in a status of Conditionally Satisfied and **Default to: If process results in a status of Not Satisfied**

Use these check boxes to set the status default settings on the Run Post Enrollment Requirement Checking page: Conditionally Satisfied status and/or Not Satisfied.

You can override the values on the batch processing page.

Batch Processing: Process Drops for Non-Compliance

Default Non-Compliance Selection To

Process administrative student drops for students who are non-compliant with class enrollment requirements.

Process Drops for

Set the default options that you want to appear in the Non-Compliance Selection group box on the Process Drop Requests for Post Enrollment Requirement page:

- students where Drop Request Indicator is selected: the process drops only students for whom the drop request indicator is selected.
- students with a post enrollment requirement status of:When this option is selected, the Conditionally Satisfied and Not Satisfied check boxes become available for selection. The process drops only students that have a non-compliant post enrollment requirement status that matches the check box selection.

Allow Override of Action Date

Select this check box to allow a user to override the action date for Process Drop requests: the Override Action Date check box is available on the Process Drop Requests for Post Enrollment Requirement page. The user must have enrollment security to override the action date.

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Setting Up Enrollment Requisites .

See [PeopleSoft Enterprise Student Records 9.0 PeopleBook - Update 1]Managing Post Enrollment Requirement Checking.

Communication Category Default

This value default is used when creating communications for PERC. A value of *PERC* is delivered but can be changed. The value should be unique.

See [PeopleSoft Enterprise Campus Community 9.0 Fundamentals PeopleBook - Update 1]Defining a Communication Category.

If you plan to use communications for post enrollment requirement checking, use the instructions in the following document to set up communications and then use the 3Cs process to create and generate the communication:

See: PERC Communications Setup and Processing.pdf. This document is included in the PERC Documentation Package which is posted to My Oracle Support.

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