Using Curriculum Management

Reissued Manual as of December 18, 2009

This is a new edition of the *Using Curriculum Management* manual, for Colleague Release 18. This edition replaces the previous edition dated December 19, 2005, and incorporates the changes delivered with software update SU48385.37-1805.

The Primary Changes Made

Section	Pages	Changes Made
Defininig Books and Course Materials	69-71	New section describes the new Books (BOOK) and Book Detail (BKDT) forms.
Copying Sections in Batch	111-115	Updated to include new version of Section Batch Copy (SBCP), Courses (CRSE), and Sections (SECT) forms.

Datatel Colleague® Student

Using Curriculum Management

Release 18

December 18, 2009

For last-minute updates and additional information about this manual, see AnswerNet page 2332.52.

Using Curriculum Management

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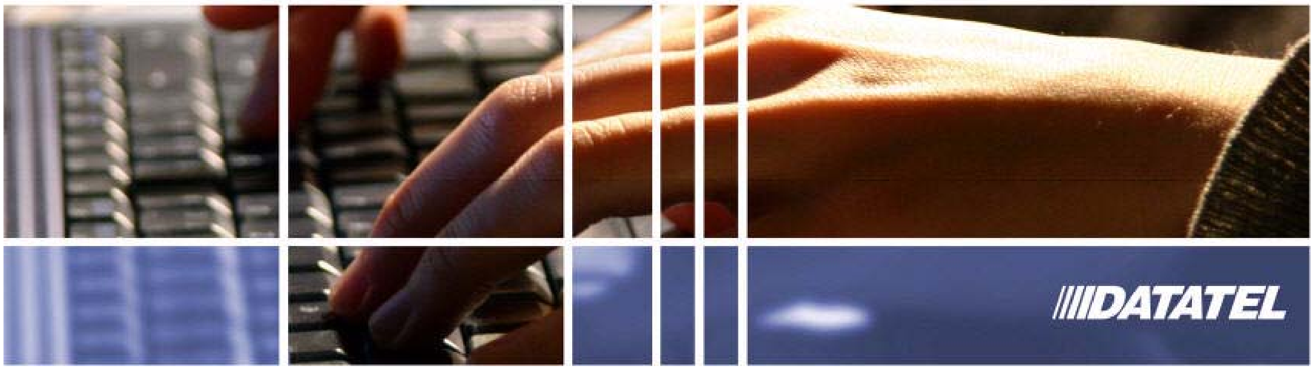


Using Curriculum Management

Introduction

About This Manual

Who Should Read This Manual

Anyone who uses Colleague to process or monitor your institution's academic programs and courses should read this manual. This group includes the registrar and the registrar's administrative staff.

What This Manual Covers

This manual provides instruction for using Colleague to record and maintain information about your academic programs, courses, and sections.

How This Manual is Organized

This manual is organized as follows:

- Part 1, "Introduction," which you are reading now, provides information about this manual and its organization, and an overview of the Curriculum Management module and where it fits in Colleague.
- Part 2, "Academic Programs," provides procedures for recording information about academic programs.
- Part 3, "Courses," provides procedures for recording information about the courses offered by your institution.
- Part 4, "Sections," provides procedures for recording information about sections (also called course sections) which are specific offerings of a course.
- Part 5, "Waitlists," provides procedures for creating waitlists for course sections that have met their registration limit.

Parts 2, 3, and 4 are presented in the same order as they appear on the Curriculum Management menu in Colleague: Programs, Courses, and Sections. This order does not imply that your work must proceed in that order. For example, if you are creating a program which includes a newly defined course as a requirement, you would first record the course information (using the procedures in the “Courses” part of the manual), then record the program information (using the procedures in the “Academic Programs” part of the manual).

Where to Find More Information

This manual provides task-oriented procedures for using the Curriculum Management module as part of your daily office activities. The following sources of information provide additional assistance in day-to-day use of the Curriculum Management module.

Table 1: Sources of Information for Using the Curriculum Management Module

For information about...	See...
Detailed information about each form and field in the Curriculum Management module	Online help
Instructions for performing basic functions (such as accessing forms, entering data, and accessing online help) using each of the available Colleague interfaces	Guide to User Interface
In-person instruction in using the Curriculum Management module	Training classes offered by Datatel
Procedures for using modules that interface with the Curriculum Management module	Other procedural manuals: • *Using Academic Records* • *Using Accounts Receivable and Cash Receipts* • *Using Block Registration* • *Using Communications Management* • *Using Degree Audit* • *Using Demographics* • *Using Faculty Information* • *Using Recruitment/Admissions Management* • *Using Registration* • *Using Scheduling*

If you need information about implementing, installing, and setting up the Curriculum Management module, see your system administrator. You can also refer to the following resources.

Table 2: Additional Sources of Information for Colleague and the Curriculum Management Module

For information about...	See...
Last-minute updates and additional information	AnswerNet page 2332.52.
Installing the Colleague software	Installation Procedures for your Colleague release level
Setting up Curriculum Management codes and parameters	Getting Started with the Student System
Detailed information on each Colleague subroutine, file, field, form, procedure, validation code, list specification, and batch process	Technical documentation available in the “For Our Clients” section of the Datatel web site
Changes and enhancements to the system since the previous release	Release Highlights for your Colleague release level
Known software issues	AnswerNet

About the Curriculum Management Module

In This Chapter

The Curriculum Management module is a part of the Instructional Management component of Colleague's Student System. The Curriculum Management module allows your institution to create and maintain academic programs, courses, and sections.

Colleague

Colleague is Datatel's administrative software solution, designed to support every aspect of an institution from student services and financial management to human resources. Figure 1 is an overview diagram of Colleague. Of Colleague's four systems, two are important to the Curriculum Management module:

- The **Core System** is at the center of Colleague, providing a central location for information and processing rules used throughout Colleague.
- The **Student System** provides an automated administrative solution for all aspects of student services provided by your institution.

The two other Colleague systems, Colleague HR and Colleague Finance, have little interaction with the Curriculum Management module.

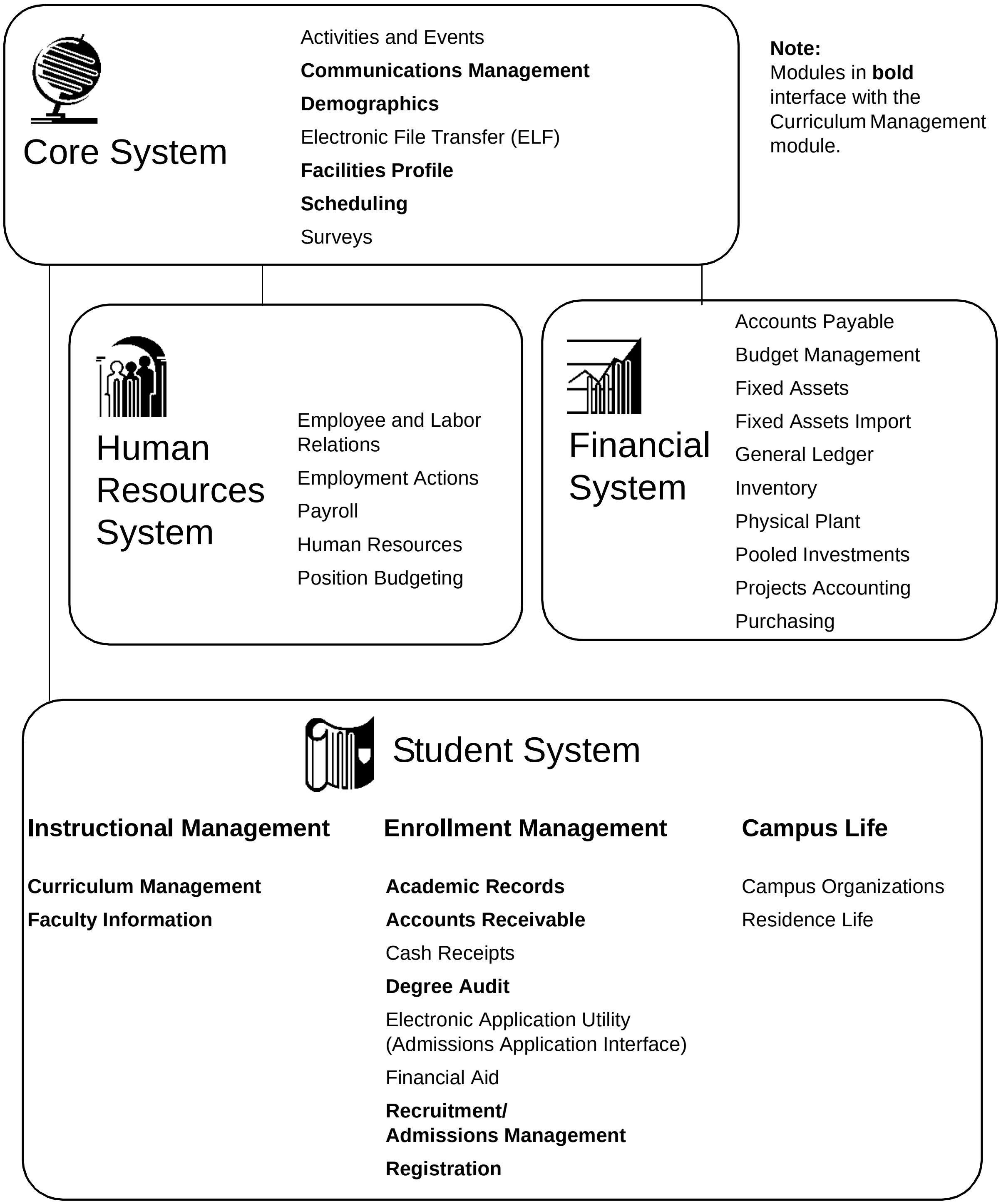


Figure 1: Location of the Curriculum Management Module within Colleague

Colleague Core is divided into seven modules. Four of those modules interface with the Curriculum Management module: Communications Management, Demographics, Facilities Profile, and Scheduling. See "Interfaces with Other Colleague Modules" on page 20 for more information on those interfaces.

Colleague Student

Colleague Student is divided into three components (Instructional Management, Enrollment Management, and Campus Life), and then further divided into twelve modules. The Curriculum Management module is part of the Instructional Management component. See *Getting Started with Colleague Student* for a detailed description of the Student System and each of its components and modules.

Six Student System modules interface with the Curriculum Management module: Faculty Information, Academic Records, Accounts Receivable, Degree Audit, Recruitment/Admissions Management, Registration, and Block Registration. See "Interfaces with Other Colleague Modules" on page 20 for more information on those interfaces.

The Curriculum Management Module

Features of the Curriculum Management Module

The Curriculum Management module enables your institution to make the job of scheduling courses, classrooms, and faculty more efficient and productive. With the Curriculum Management module, you can:

- Define a variety of term-based and non-term-based schedules, as well as adult and continuing education courses
- Schedule courses and sections, producing customized course catalogs and schedules
- Define all aspects of each course, including name, description, credits, course level, prerequisites, locations, grading policies, and needed supplies
- Define criteria to manage waitlists for sections
- Perform individual or batch changes in the schedule, automatically notifying affected students and faculty
- Provide a historical summary of each course
- Designate courses for block registration
- Generate space utilization reports
- Define and maintain program requirements

Interfaces with Other Colleague Modules

Figure 2 shows the Colleague modules which interface with the Curriculum Management module, along with the information which flows to or from the Curriculum Management module. Four Core System modules and six Student System modules interface with the Curriculum Management module.

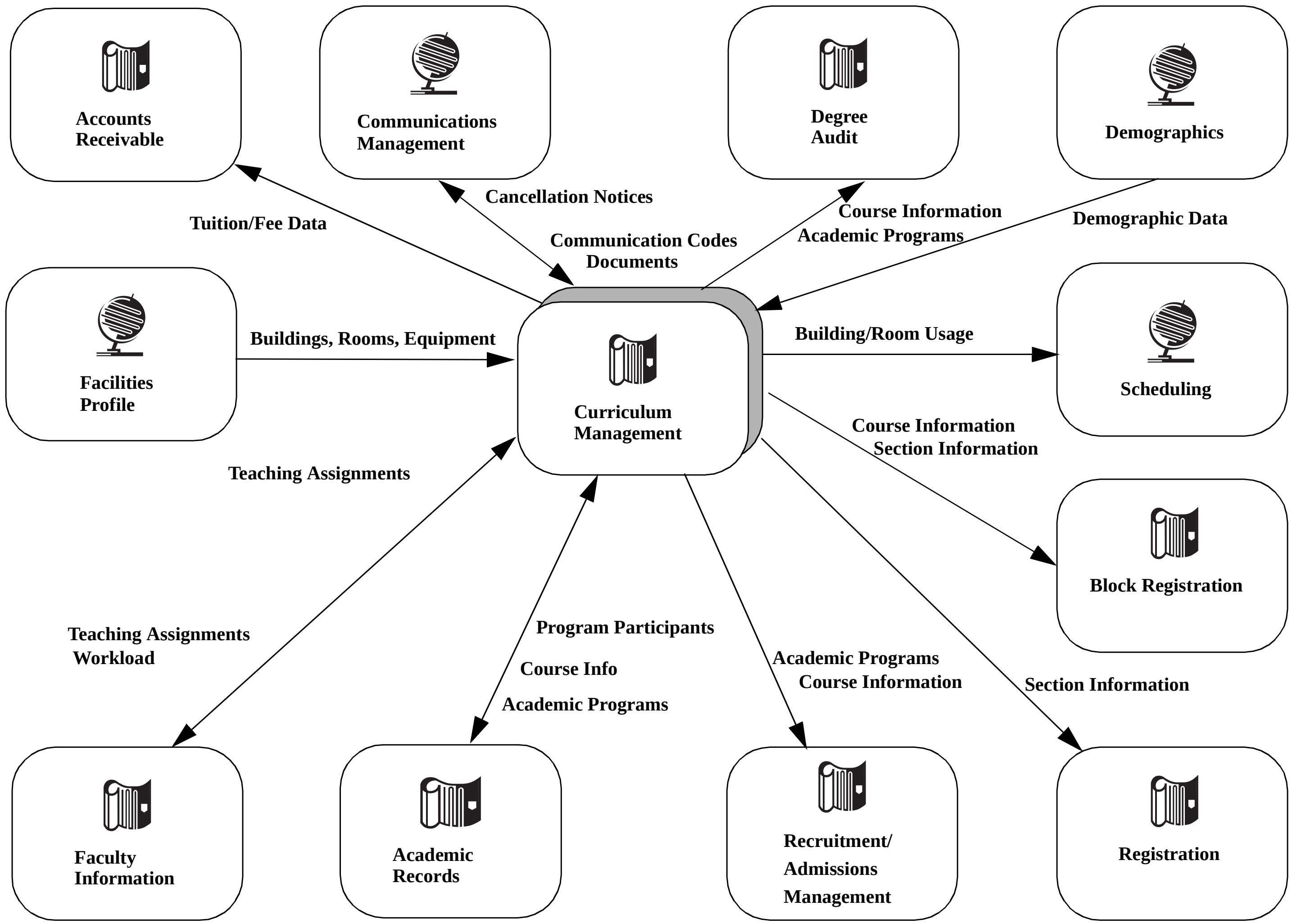


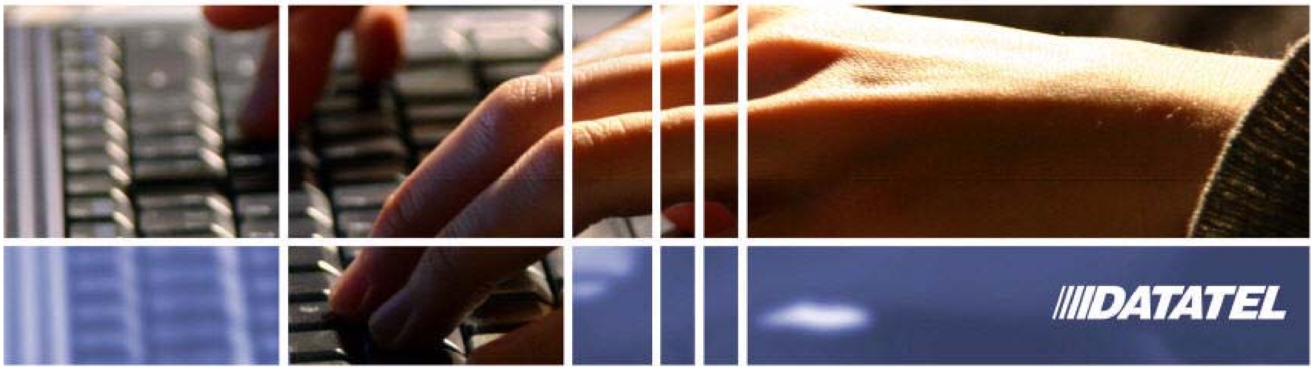
Figure 2: The Curriculum Management Module and Colleague

Accessing Colleague and the Curriculum Management Module

There are many ways to set up access to Colleague, and the setup at your institution may differ from that at another institution. Because of these differences, Datatel does not provide procedures for accessing Colleague. Your supervisor or system administrator should provide you with your Colleague login ID, password, and step-by-step instructions for accessing the system.

Once in Colleague, you can access forms in the Curriculum Management module. See *Guide to User Interfaces* for information about accessing a form and navigating around a form.

Note: Your system administrator can set up Colleague to restrict access to certain parts of the system for each user. If you find that you cannot access a form which you need to perform your work, see your supervisor or system administrator.



Using Curriculum Management

Academic Programs

Academic Program Basics

In This Chapter

This chapter gives a summary of academic programs, and provides instructions for creating programs.

Understanding Academic Programs

An *academic program* is a program of study offered by your institution. Examples of academic programs include a Bachelor of Arts in History or a self-improvement program. Typically, an academic program has specific *requirements* that establish a way to measure a student's progress toward completion of that program. A student must complete those requirements, which can be a combination of course work and noncourse work, to finish the academic program. Completion of an academic program may, but does not have to, result in a degree.

Each applicant or student must be assigned to at least one active academic program at a given time. Occasionally, a student may be in multiple programs at once. For example, a student may be finishing up an undergraduate degree while already starting a graduate degree.

When students choose a particular academic program, they inherit the attributes you defined for that program into their own student academic program. For example, a student assigned to the BA History program automatically inherits the characteristics of that program, identifying the student as an undergraduate student seeking a Bachelor of Arts degree and majoring in History. This academic program can later be modified, customized, or withdrawn.

Administrative and Functional Parts of a Program

You can think of a Colleague academic program as being made up of two parts: an administrative part and a functional part.

- The *administrative part* includes attributes like department, degree, majors and minors, and locations where the program is offered. In Colleague, you define the administrative part of a program on the Academic Programs (PROG) form.
- The *functional part* defines the requirements that a student must satisfy in order to complete the program. These requirements include, for example, required courses, permitted elective courses, and minimum GPA required to complete the program. In Colleague, you define the functional part of a program on the Academic Program Requirements (APRS) form, the Academic Requirements (REQU) form, and the Subrequirement Specifications (SRSP) form. The functional part of the program is optional, but must be completed if you are using the Degree Audit module to evaluate a student's progress toward completing the program.

This manual tells you how to define the administrative part of a program and some of the basic pieces of the functional part of a program. *Using Degree Audit* tells you how to define the rest of the functional part of a program: requirements (on the REQU form) and subrequirements (on the SRSP form).

Using Catalogs to Create Different Versions of a Program

From one year to the next, you might want to change the requirements for completing a program. For example, your BA in History program might require that all freshmen take History 101, Introduction to American History. You might decide to change that requirement to History 102, Introduction to World History. You would probably want to keep the same program name, but you would want to keep the old version of the program because your older students would still be on the old version and graduates would have the old version on their records.

In Colleague, you can create a new version of an existing program by associating the program with a different catalog. Typically, catalogs identify the periods (such as academic years) when that version of the program is offered. Each catalog version of a program can have its own set of academic requirements. The administrative part of the program is the same on all of the catalogs, but the functional part (requirements) can differ.

When you define requirements for a program, on the APRS, REQU, and SRSP forms, you are defining requirements for a particular program/catalog combination.

Note: In Colleague, the word “catalog” has two different meanings, both related to curriculum. In one definition, discussed here, a catalog is a group of academic programs offered during a specific time period. The other definition is a course catalog, which is a published report of course information (see “Generating a Course Catalog” beginning on page 95).

Interfaces With Other Modules

Other Colleague modules use academic programs, and you must consider those uses when you set up your programs in Curriculum Management. The interfacing modules are:

- **Recruitment/Admissions Management.** Each applicant and student must be assigned to a program. Your program setup helps to determine how an applicant is evaluated for admission to the program.
- **Degree Audit.** The setup of both the administrative and functional parts of the academic program helps to determine how a student’s work is evaluated in Degree Audit. See “Interface with the Degree Audit Module” below for more discussion.
- **Academic Records.** Each student’s academic standing and graduation will be determined in part by the requirements of the student’s academic program.

The people at your institution responsible for using those modules should have input into the setup of your academic programs.

Interface with the Degree Audit Module

If your institution has the Degree Audit module, you can run an evaluation, using the Degree Audit evaluator, to determine a student’s progress toward completing a program. When you perform an evaluation, the Degree Audit evaluator will compare the student’s academic activity to the program requirements, and determine which requirements are satisfied and which requirements are incomplete. If necessary, you may override the Degree Audit evaluator’s application of academic activity to requirements and apply academic credit manually.

The Degree Audit module also allows you to customize students' programs by adding requirements to their program and granting exceptions and waivers to requirements. If your institution creates a lot of custom programs, you may want to create a standard program with minimal requirements and use it as a template to assign to all students. The students can then work with their advisors to build a custom program.

How you set up each program and the Degree Audit module determines which activity is applied to which requirement. A student may have multiple academic credits that satisfy a specific requirement. One of those credits may satisfy several requirements. Based on how you set up the Degree Audit module, some of the student's credit logically may not be applied toward any requirement. You have the ability to override decisions made by the Degree Audit evaluator and apply academic credit toward a requirement that otherwise would not be met.

For example, a student has completed Math 101 and Math 102. Math 102 may be applied to a specific requirement (core math requirement). Math 101 may be applied to multiple requirements (core math and computer elective). Depending on how you set up the Degree Audit module concerning the order in which academic credits are applied, the evaluator may apply Math 101 to the core requirement and report that the computer elective is incomplete. You can override this decision and apply Math 102 toward the core math requirement and apply Math 101 toward the computer elective.

This manual tells you how to create a standard program and define the administrative characteristics and basic functional characteristics of the program. *Using Degree Audit* tells you how to define the rest of the functional parts (requirements) of a program, customize the program for a student, and evaluate a student's progress.

Creating Programs and New Versions of Programs

Before You Begin

Before you create an academic program, you should define the following codes. See *Getting Started with Colleague Student* for information about defining these codes.

- Catalogs codes
- CCD codes
- Degree codes
- Locations codes
- Majors codes
- Minors codes
- Program status codes
- Specializations codes
- Transcript groupings codes

Creating Programs and New Versions of Programs

With Colleague, you can create a new original program or you can create a new version of an existing program by adding the program to another catalog. There is more than one way to perform each of these tasks.

You can create a program using either of the following two methods:

- **Create a new program.** You can create a new original program by using the Academic Programs (PROG) form. For this option, you enter each of the program characteristics by completing the fields on the form. This option is appropriate if the new program is not similar to any of the programs you have already entered in Colleague. See "Creating New Programs" on page 31 for the procedure.
- **Copy an existing program.** You can create a program by copying an existing program using the Academic Program Copy (APCO) form. The characteristics of the existing program are copied into the new program. By copying the program, you can avoid the work of entering all of the information. This option is appropriate if the new program is similar to an existing program. See "Creating a Program by Copying an Existing Program" on page 32 for the procedure.

You can create a new version of an existing program, by adding the program to another catalog, using any of the following three methods:

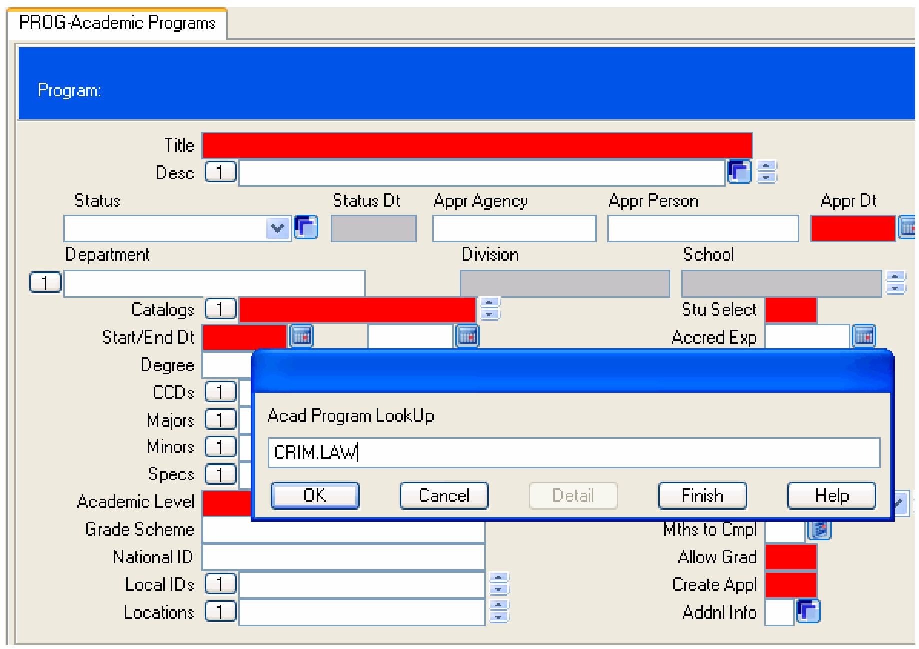
- **Add a catalog from the PROG form.** You can add a catalog to the list of catalogs on the PROG form, and then detail to the APRS form to define requirements for the new program/catalog combination. See "Adding a Catalog on the PROG Form" on page 34 for the procedure.
- **Copy an individual program from one catalog to another.** You can copy an existing program from one catalog to another using the Academic Program Copy (APCO) form. All of the characteristics of the existing program, including requirements, are copied to the new version of the program. See "Copying an Individual Program from One Catalog to Another" on page 36 for the procedure.
- **Copy a set of programs from one catalog to another.** You can copy programs in batch from one catalog to another using the Catalog Copy (CATC) form. The programs and all of their characteristics are copied to the new catalog. See "Copying a Set of Programs from One Catalog to Another" on page 37 for the procedure.

Creating Programs

Creating New Programs

Figure 3 shows the Academic Programs (PROG) form, which you can use to create a new program.

Figure 3: Academic Programs (PROG) Form



At the Acad Program LookUp prompt, enter a name for your program. Colleague then prompts you to add the new program.

Note: If the name you select for your new program matches the name of an existing program, the existing program will be displayed on the PROG form. Cancel from the form and pick a new (unique) name for your program.

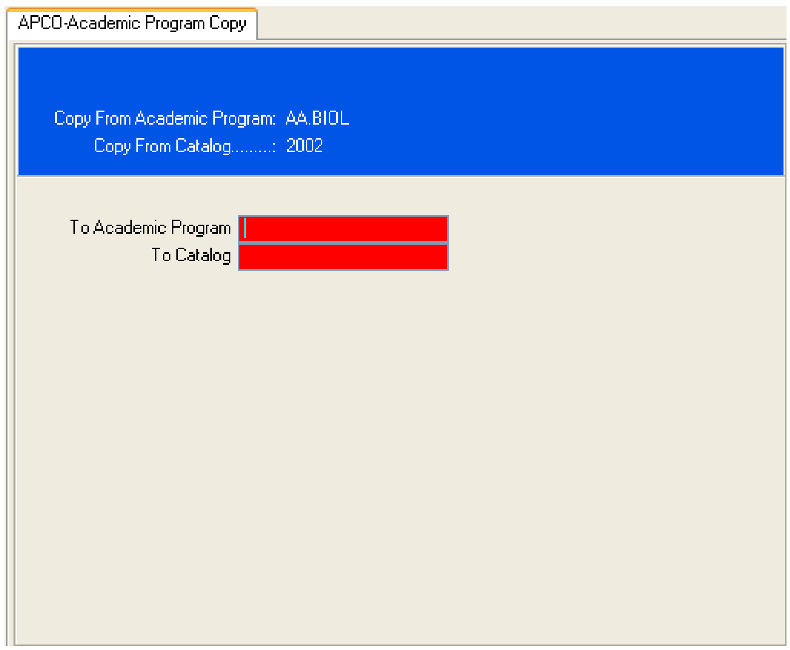
After you enter the program name, you must then define characteristics for the program. See “Defining Program Characteristics” beginning on page 39 for the procedure.

Creating a Program by Copying an Existing Program

Understanding Program Copying

In some cases, you can save time by copying an existing academic program and then modifying the copy. For example, you might want to create a new program that is similar to an existing program. Use the Academic Program Copy (APCO) form to copy an existing program.

Figure 4: Academic Program Copy (APCO) Form



From the LookUp prompts, enter the program/catalog combination you want to copy. Then, in the To Academic Program and To Catalog fields, enter the new program/catalog combination you want to create. When you copy a program, the new program inherits the characteristics of the existing program (except for the associated catalogs).

Procedure for Copying an Existing Program

Perform the following steps to create a new program by copying an existing program.

Step 1. Access the Academic Program Copy (APCO) form.

Step 2. At the Academic Program LookUp prompt, enter the name of the existing program that you want to copy.

Step 3. If Colleague displays a list of catalogs, select a catalog to copy from.

Colleague displays the list of catalogs only if the program is associated with more than one catalog. If the program is associated with just one catalog, Colleague automatically enters that catalog in the Copy From Catalog field.

Step 4. In the To Academic Program field, enter the name of the program that you want to create.

Step 5. In the To Catalog field, enter the name of the catalog to which you want to associate the new program.

If you skip this field, Colleague automatically copies the catalog from the Copy From Catalog field into the To Catalog field.

Step 6. Finish from the APCO form.

Colleague takes you to the Academic Programs (PROG) form to define program characteristics.

See "Defining Program Characteristics" beginning on page 39.

Creating a New Version of an Existing Program

You can create a new version of an existing program using any of the three following methods:

- Adding a catalog on the Academic Programs (PROG) form
- Copying an individual program from one catalog to another
- Copying a set of programs from one catalog to another

Each of these procedures is described in the following sections.

Adding a Catalog on the PROG Form

You can add a catalog to the list of catalogs on the PROG form, then detail to the APRS form to define requirements for the new program/catalog combination.

Note: If you use this method, you will need to enter all of the program requirements on the APRS form. This method is appropriate if the requirements for this version of the program are not similar to those for any existing versions.

You can also make a new version of the program that is similar to an existing version by copying the program from one catalog to another, as discussed in "Copying an Individual Program from One Catalog to Another."

Perform the following steps to create a new version of a program by adding a catalog on the PROG form.

Step 1. Access the Academic Programs (PROG) form

Step 2. At the Acad Program LookUp prompt, access the existing program.

Step 3. In the Catalogs field, move to a blank window and select the name of the catalog to which you want to add this program.

Step 4. Enter the catalog if you know it, or perform a LookUp to select from a list of existing catalogs.

Step 5. Detail from the Addnl Info field to the Academic Program Requirements (APRS) form.

Step 6. Select the new catalog from the list of catalogs associated with the program.

Step 7. On the APRS form, define requirements for the program/catalog combination.

See "Defining Catalog-Specific Program Characteristics" on page 45.

Copying an Individual Program from One Catalog to Another

Use the Academic Program Copy (APCO) form, shown in figure 4 on page -32, to copy a program from one catalog to another. All of the characteristics of the existing program, including requirements, are copied to the new version of the program.

Perform the following steps to copy an existing program from one catalog to another.

Step 1. Access the Academic Program Copy (APCO) form.

Step 2. At the Academic Program Lookup prompt, enter the name of an existing program.

Step 3. If Colleague displays a list of catalogs, select a catalog to copy from.

Colleague only displays the list of catalogs if the program is already associated with more than one catalog. If the program is associated with just one catalog, Colleague automatically enters that catalog in the Copy From Catalog field.

Step 4. In the To Academic Program field, enter the same program name as that in the Copy From Academic Program field.

Step 5. In the To Catalog field, enter the name of the new catalog to which you want to associate the program.

Step 6. Finish from the APCO form.

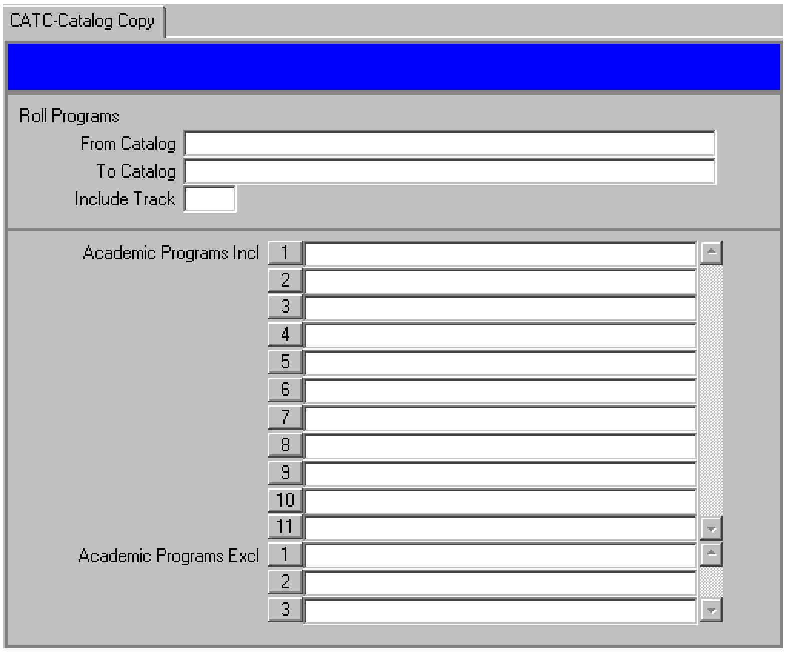
Colleague takes you to the Academic Programs (PROG) form to define program characteristics.

See “Defining Program Characteristics” beginning on page 39.

Copying a Set of Programs from One Catalog to Another

Use the Catalog Copy (CATC) form to copy, or "roll," academic programs from one catalog forward to another catalog.

Figure 5: Catalog Copy (CATC) Form



The CATC process does not create a new catalog; the CATC process only copies academic programs from an existing catalog to a new catalog. You must create and define the new catalog before beginning this process. Use the Catalogs (CTLG) form to create and define the new catalog.

The CATC process updates the new catalog (the catalog you enter in the To Catalog field) with the selected academic programs. You can copy all the academic programs from the catalog entered in the From Catalog field, or you can limit the copying process by using the Academic Program Incl and Academic Program Excl fields.

The CATC process also copies academic requirements (as entered on the APRS form). However, it will not overwrite any requirements that have already been specified for the new catalog.

Defining Program Characteristics

In This Chapter

This chapter tells you how to define characteristics for the programs you create in Colleague. You define basic administrative characteristics on the Academic Programs (PROG) form and additional characteristics on other forms that you can reach by detailing from the PROG form.

Table 3 lists the forms used to define program information, along with the section in this manual or another manual that provides procedures for completing that form.

Table 3: Forms Used to Define Program Characteristics

Task	Form	Detail from this field on PROG	Reference
Characteristics that apply to all versions of a program (in all catalogs)			
Define administrative characteristics for a program.	Academic Programs (PROG)	—	“Defining Administrative Characteristics for a Program” on page 41
Define admissions rules for a program.	Academic Program Admit Rules (ADMR)	Addnl Info	“Characteristics that Apply to All Program Versions” on page 43
Define graduation honors rules.	Graduate Honor Rules (GRHL)	Addnl Info	
Define restrictions on how a program can be customized for a student.	Program Addnl Restrictions (PRAR)	Addnl Info	
Define rules for evaluating external transcripts.	Acad Program Extl Tran Rules (AETR)	Addnl Info	
Assign people as contacts for a program.	Academic Program Contacts (APCN)	Addnl Info	
Record comments about a program.	UTED	Addnl Info	

Table 3: Forms Used to Define Program Characteristics (cont'd)

Task	Form	Detail from this field on PROG	Reference
Characteristics that apply to a single version of the program (in one catalog)			
Define basic functional characteristics for a program/catalog combination.	Academic Program Requirements (APRS)	Addnl Info	"Defining Catalog-Specific Program Characteristics" on page 45
Define course requirements for completing a program.	Academic Requirements (REQU) and Subrequirement Specifications (SRSP)	Detail from the Requirements field on the APRS form.	Using Degree Audit

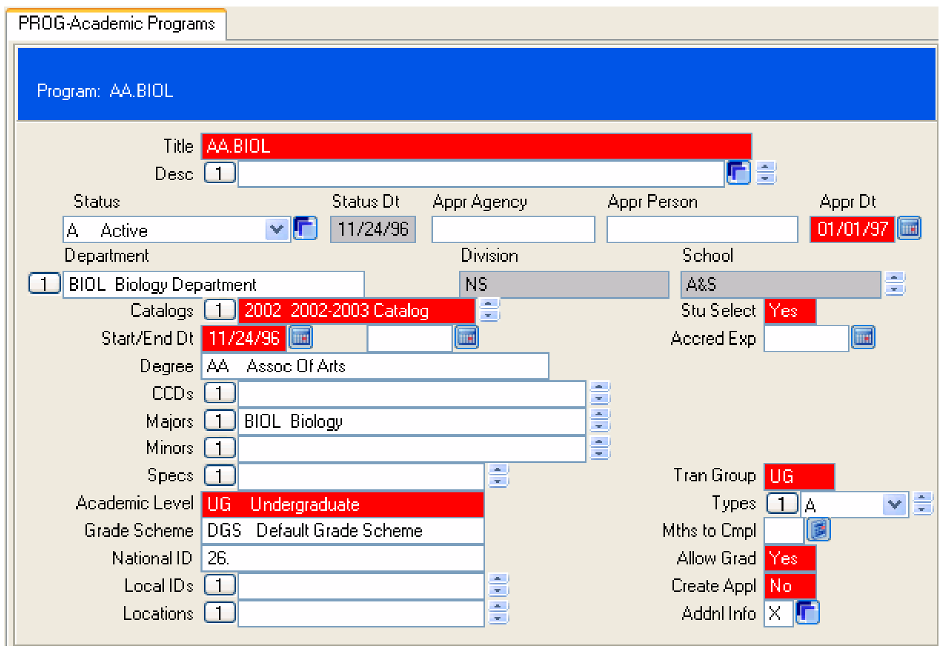
Before You Begin

You can define characteristics for a new program, or modify characteristics for an existing program. If you are defining characteristics for a new program, you must first create the program in Colleague. See "Creating Programs and New Versions of Programs" beginning on page 29 for the procedures.

Defining Administrative Characteristics for a Program

Use the Academic Programs (PROG) form to define administrative characteristics for a program. Figure 6 shows the PROG form completed for an example program.

Figure 6: Example of the Academic Programs (PROG) Form



Noteworthy Fields on the PROG form

The fields described in this section are particularly important when you define administrative characteristics for a program. See online help for additional information about fields on this form.

- **Status.** Colleague maintains a history of the status of the program. You can detail to the Acad Program Status History (PRST) form to view and modify the course’s historical status changes.
- **Academic Level.** When assigning an academic level to the program, consider the effect on registration. Each student is associated with a

program, and the academic level for that program may limit the courses for which a student can register.

- **Tran Group.** The transcript grouping for a program determines which courses will be included in a Degree Audit evaluation and which courses will appear on the student's transcript. For example, you may want to apply only undergraduate coursework completed at your institution to the Degree Audit evaluation.
- **Stu Select.** When you change this field from "No" to "Yes," you allow the use of this program in what-if scenarios on the Proposed Student Program (PSPR) form. You will are prompted as to whether or not you want to add the program to the Acad Programs field on the WAPP form. If you choose to do so, you then allow WebAdvisor users to select the program in a what-if scenario.

  When you change this field from "Yes" to "No," the PSPR form no longer allows what-if scenarios for this program, and it is automatically removed from the Acad Programs field on the WAPP form, which makes it no longer available in WebAdvisor.

Characteristics that Apply to All Program Versions

From the Addnl Info field on the PROG form, you can detail to other forms to define other program characteristics. One of those forms is the Academic Program Requirements (APRS) form (discussed in "Defining Catalog-Specific Program Characteristics" on page 45) on which you define requirements that apply to a specific program/catalog combination. The other forms, discussed below, are used to define characteristics that apply to all versions of the program.

Admissions Rules. To define admission eligibility rules, detail from the Addnl Info field to the Academic Program Admit Rules (ADMR) form. Enter the rule defining who may be assigned to the program, and the application status. See *Using Recruitment/Admission Management* and the Recruitment/ Admissions Management section of *Getting Started with Colleague Student* for more information about academic program admission rules.

Graduation Honors Rules. To define rules for graduation honors, detail from the Addnl Info field to the Graduate Honors Rules (GHRL) form. Enter the rules defining any honors associated with the academic program. If you do not define graduation honors rules for a program, Colleague uses the graduation honors rules defined for the academic level associated with the program. If the academic level does not have graduation honors rules, Colleague does not assign graduation honors to students in the program. See *Using Academic Records* and the Academic Records section of *Getting Started with Colleague Student* for more information about graduation honors.

Additional Restrictions. You can limit the Certificates, Credentials, and Diplomas (CCDs), majors, minors, and specializations that may be added to the program when it is customized for a student. Access the Program Addnl Restrictions (PRAR) form from the Addnl Info field. If you do not place restrictions on a program using the PRAR form, any CCD, major, minor, or specialization may be added to a program to customize the program for a student. See *Using Degree Audit* for information about customizing a program for a student.

External Transcript Rules. Colleague can evaluate external transcripts when considering an applicant for admission to a program or when calculating a student's GPA for the program. External transcript rules tell Colleague how to interpret the transcript for a program. Use the Acad Program Extl Tran Rules (AETR) form, accessible by detailing from the Addnl Info field, to define external transcript rules for a program. See *Using Recruitment/Admissions Management* for more information about external transcripts.

Program Contacts. You can identify certain people at your institution as contacts for an academic program. Detail from the Addnl Info field to the Academic Program Contacts (APCN) form. The person must already exist in the Colleague PERSON file.

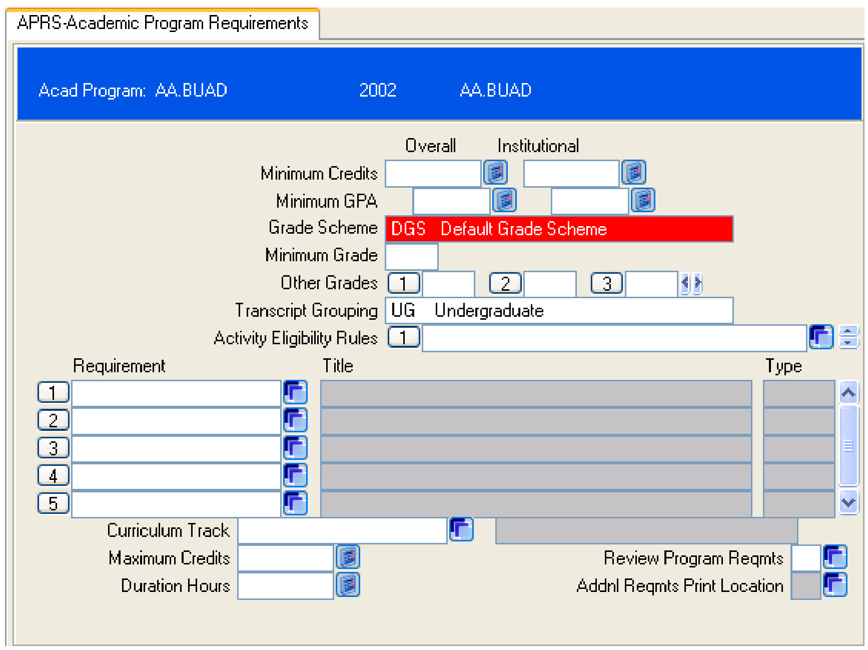
Program Comments. To record comments about the program, detail from the Addnl Info field to the Edit Comments (UTED) form.

Program Additional Information. To define honors, admissions capacity, funding sources, and a home-language-not-required reason for an academic program, detail from the Addnl Info field to the Additional Acad Program Info (APRI) form.

Defining Catalog-Specific Program Characteristics

Use the Academic Program Requirements (APRS) form to define program characteristics that apply to a specific program/catalog combination.[1] You can access the APRS form from the menu or from the Addnl Info field on the Academic Programs (PROG) form.

Figure 7: Academic Program Requirements (APRS) Form

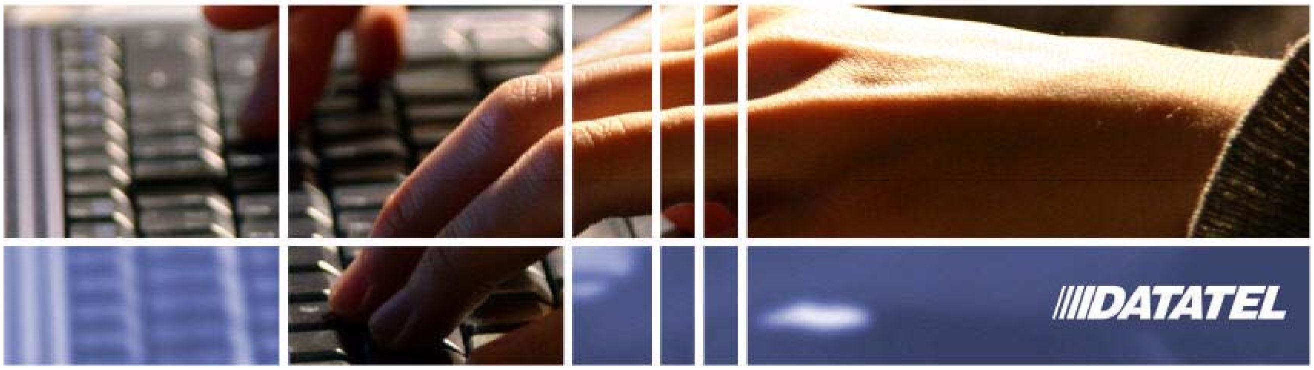


1. Most of the fields on the APRS form apply only to the program version associated with one catalog. Two fields, however, affect the basic program characteristics that apply to all versions of a program, for all associated catalogs. Those fields are Grade Scheme and Transcript Grouping. When you enter values in the Grade Scheme and Transcript Grouping fields on the APRS form, it has the same effect as entering values in the Grade Scheme and Tran Group fields on the Academic Programs (PROG) form.

Noteworthy Fields on the APRS Form

The fields described in this section are particularly important when you define program characteristics. See online help for additional information about fields on this form.

- **Tran Group.** The transcript grouping for a program determines which courses will be included in a Degree Audit evaluation and which courses will appear on the student's transcript. For example, you may want to apply only undergraduate coursework completed at your institution to the Degree Audit evaluation.
- **Requirements.** From this field, you can associate degree audit requirements to the program. If the course requirement does not exist in the database, you can define the requirement by detailing to the Academic Requirements (REQU) form. For information about defining requirements and associating them to an academic program, see *Using Degree Audit*.



Using Curriculum Management

Courses

Courses

This chapter provides procedures for creating and maintaining courses. Included are procedures for the following tasks:

- "Creating Courses" beginning on page 53 tells you how to create a course, either from scratch or by copying another course.
- "Defining Course Characteristics" beginning on page 59 tells you how to define characteristics (for example, requisites and restrictions) for a course.
- "Changing Course Definitions" beginning on page 79 tells you how to change course information (including course name and number) while maintaining the integrity of your existing student records.
- "Working With Courses" beginning on page 87 addresses procedures for equating courses and grouping courses for registration.
- "Viewing and Reporting Course Information" beginning on page 91 provides procedures for generating lists and reports of course information, including a course catalog.

Understanding Courses

At the heart of your curriculum are the courses that you offer your students. In Colleague, courses are related to both academic programs and sections:

- Courses can be included as requirements in academic programs. See *Using Degree Audit* for information about using courses as program requirements.
- Courses are templates for sections. Sections, also called course sections, are specific offerings of a course. You can create as many sections for a particular course as you need and reuse the course template for ensuing academic terms. See Part 4, "Sections" for information about creating and maintaining sections.

Course Names and IDs

Before you work with courses, you should understand the two types of course identifiers used in Colleague: Course Name and Course ID.

Course Name

When you create a course, Colleague builds the course name by combining the subject and course number, separating them with the character your institution has defined as the course name delimiter. For example, you could create a course with the following information:

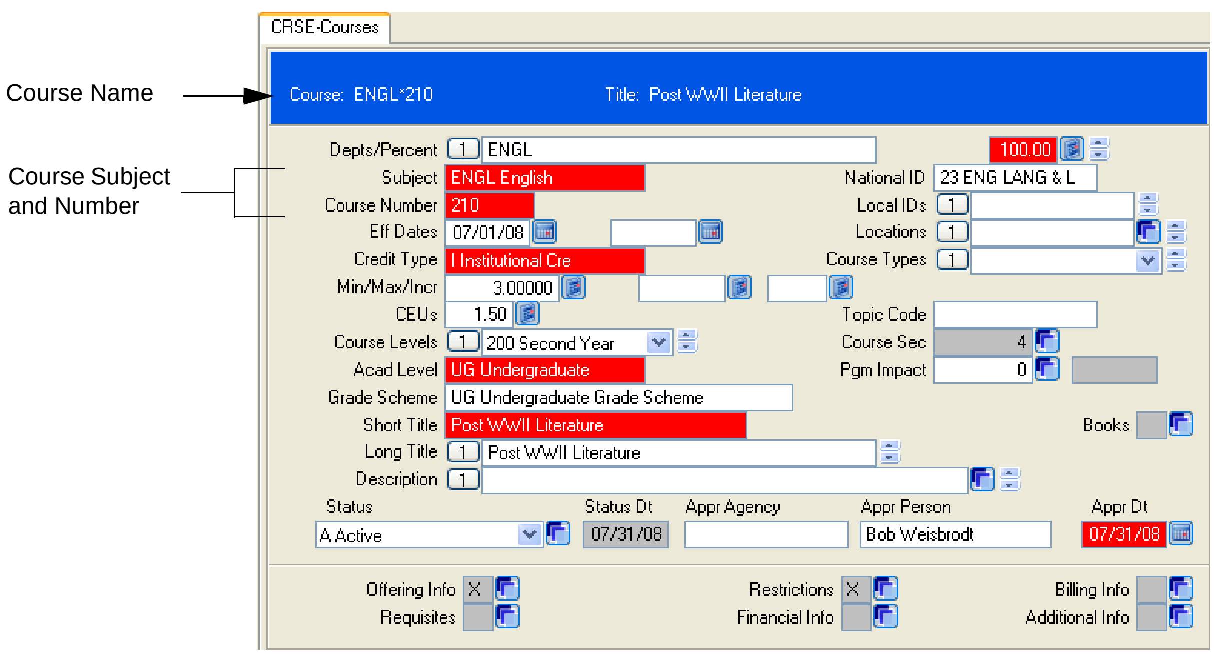
- Subject = ENGL
- Course number = 386
- Short title = American Short Story

Colleague combines the subject and course number and creates the course name of ENGL*386. For this example, the delimiter was defined as an asterisk. (The course name delimiter is defined on the Course/Section Defaults (CDEF) form.)

Note: Note the difference between "course name" and "short title" in Colleague. Course name is an identifier made up of subject and course number, while short title describes the course in words.

Figure 8 shows the course name, subject, and number as they appear on the Courses (CRSE) form.

Figure 8: Example of the Courses (CRSE) Form



Course ID

When you create a course, Colleague creates a record in the COURSES file with a unique course ID. This course ID is completely different from the course name. Colleague refers to this internal ID for all requisite and academic requirement specifications, but is not displayed on any forms.

By creating a numeric course ID, Colleague allows you to have more than one course with the same name (for example, MATH*228), and to change a course's name while maintaining the course's content. For example, if your institution has multiple campuses with unique course-naming schemes, you can create two courses called CHEM*100 and record unique titles, descriptions, credit information, prerequisites, and other information.

You should be aware of the ramifications of changing a course name or number. See "Changing Course Definitions" beginning on page 79 for more information on the relationships of course IDs and course names and how to determine whether to change a course name or to create a new course.

Creating Courses

Before You Begin

Before you create a course you should set up the following:

- Course defaults
- Course levels
- Course statuses
- Course types
- Credit types
- Departments
- Grade schemes
- Locations
- Subjects

See *Getting Started with Colleague Student* for more information about defining these items.

Two Ways to Create a Course

You can create a course in either of two ways:

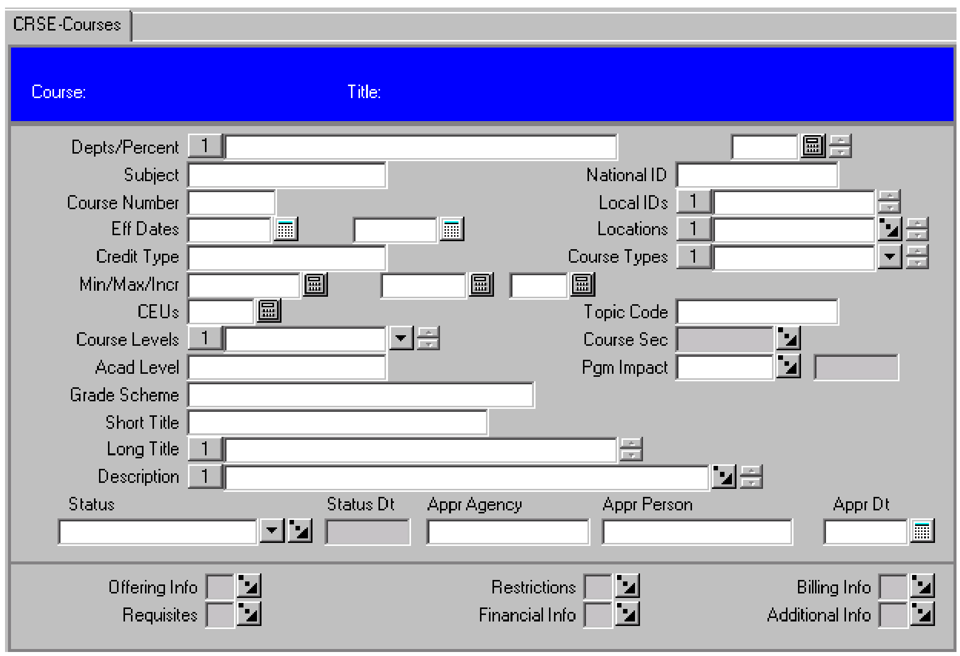
- **Create a New Course.** You can create a new course using the Courses (CRSE) form. For this option, you enter each of the course characteristics at the keyboard. This option is appropriate if the new course is not similar to any of the courses you have already entered in Colleague. See "Creating New Courses" on page 55 for the procedure.
- **By copying an existing course.** You can create a course by copying an existing course, using the Course Copy (COCO) form. Most of the characteristics of the existing course are copied into the new course. By copying the course, you can avoid the work of entering all of the information at the keyboard. This option is appropriate if the new course is similar to an existing course. See "Copying an Existing Course" on page 57 for the procedure.

Creating New Courses

Understanding Creating New Courses

Figure 9 shows the Courses (CRSE) form you use to create a new course.

Figure 9: Courses (CRSE) Form



At the Course LookUp prompt, you must enter part or all of a course name for your course. Course name, as defined in Colleague, is made up of a subject and course number (see the discussion in “Course Names and IDs” beginning on page 49). Your options are:

- You can enter just the subject. It must be a valid subject, previously defined for your institution on the Subjects (SUBJ)[1] form. For example, you could enter “ENGL.” If there are courses already defined for that subject,

1. See *Getting Started with Colleague Student* for procedures for defining subjects and departments.

Colleague will display a list of those courses. Whether such a list is displayed or not, you should select the “Add” option to create a course.

- You can enter a complete course name (a valid subject and a course number). For example, you could enter “ENGL 386.” If there is no course with that name, Colleague will prompt you to “Add” in order to create the course.

If the subject you entered is also the name of a department, previously defined for your institution on the Departments (DEPT)[1] form, then Colleague automatically enters that department name in the Depts field. For example, if ENGL is the name of a department as well as a subject, then Colleague will put ENGL in the Depts field. In addition, Colleague will fill the following fields with default information you defined for that department on the DEPT form:

- Acad Level
- Grade Scheme
- National ID

You can override the defaults by entering other information in those fields.

After you have created the course, you can define characteristics for the course. See “Defining Course Characteristics” beginning on page 59 for the procedure.

Procedure for Creating a New Course

Use the following procedure to create a new course.

Step 1. Access the Courses (CRSE) form.

Step 2. At the Course LookUp prompt, enter the name for the new course.

See “Understanding Creating New Courses” on page 55 for a discussion of entering course names.

Step 3. Define course characteristics.

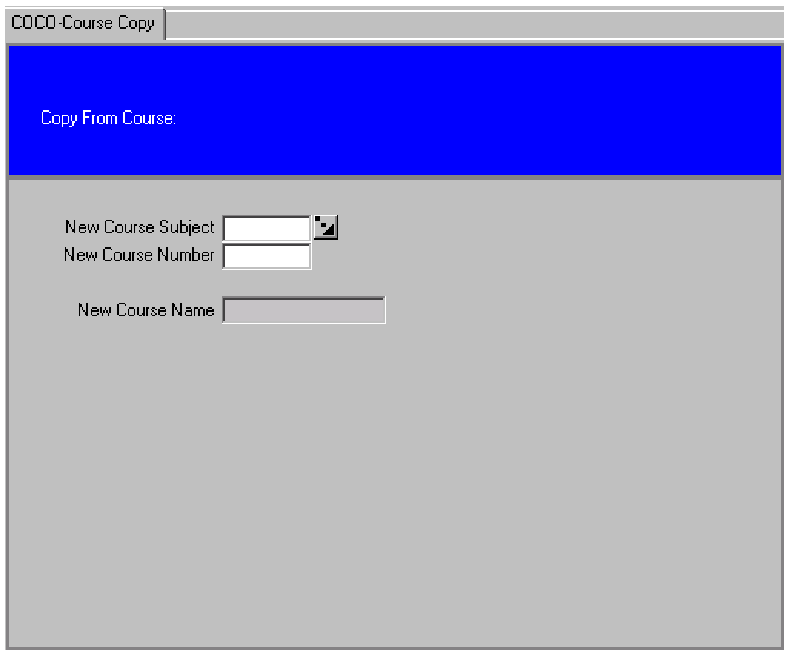
See “Defining Course Characteristics” beginning on page 59.

Copying an Existing Course

Understanding Course Copying

Use the Course Copy (COCO) form, shown below, to create a course by copying an existing course.

Figure 10: Course Copy (COCO) Form



You enter the name of the course you want to copy, and then enter the subject and number of the new course. Colleague creates a course name from the subject and number you entered. When you finish from the COCO form, Colleague takes you to the CRSE form to modify information for the new course.

When you copy a course, the new course inherits all of the characteristics of the existing course except the following:

- **Status and approval information.** The fields on the Status line on the CRSE form (Status, Status Dt, Appr Agency, Appr Person, and Appr Dt) are blank for the new course. Some of those fields are required, as discussed in "Defining Basic Course Characteristics" on page 60, and you must complete those fields before finishing from the CRSE form.

- **Terms Offered.** The Terms Offered field on the Course Offering Info (COFF) form is blank.
- **Sections.** The new course has no sections associated with it.

Procedure for Copying an Existing Course

To copy an existing course:

Step 1. Access the Course Copy (COCO) form.

Step 2. At the Course Lookup prompt, enter the name (subject and number) of an existing course.

If you enter just the subject, Colleague will give you a list of courses with that subject to select from.

Step 3. In the New Course Subject and New Course Number fields, enter the subject and number of the new course.

Step 4. Finish from the COCO form.

Colleague takes you to the Courses (CRSE) form to define course characteristics.

Step 5. Define course characteristics which the new course does not inherit from the existing course, or which you want to be different from the existing course.

You must define at least the required status information which the new course does not inherit from the existing course (see "Understanding Course Copying" on page 57)

See "Defining Course Characteristics" beginning on page 59.

Defining Course Characteristics

In This Chapter

This chapter tells you how to define characteristics for the courses that you create in Colleague. You define basic course characteristics on the Courses (CRSE) form, and additional characteristics on other forms that you can reach by detailing from the CRSE form. The table below lists the forms used to define course information, along with the section in this manual or another manual that provides procedures for completing that form.

Table 4: Forms Used to Define Course Characteristics

If you want to...	Use this form...	Accessible by detailing from this field on CRSE...	Reference
Define basic course characteristics	Courses (CRSE)	—	"Defining Basic Course Characteristics" on page 60
Record offering information about a course	Course Offering Info (COFF)	Offering Info	"Defining Course Offering Information" on page 63
Define course requisites	Course Requisites (CREQ)	Requisites	"Defining Course Requisites" on page 64
Define course restrictions	Course Restrictions (CRES)	Restrictions	"Definining Books and Course Materials" on page 69
Define location-specific course restrictions	Course Restrs by Location (CLRS)	Locations	"Defining Location-Specific Restrictions" on page 75
Define financial information for a course	Course Financial Info (CFIN)	Financial Info	"Defining Course Financial Information" on page 77
Define billing information for a course	Course Billing Information (CRSB)	Billing Info	Accounts Receivable section of *Getting Started with Colleague Student*
Define additional course information, used primarily for state reporting	Additional Course Information (ACOI)	Additional Info	"Defining Additional Course Information" on page 78

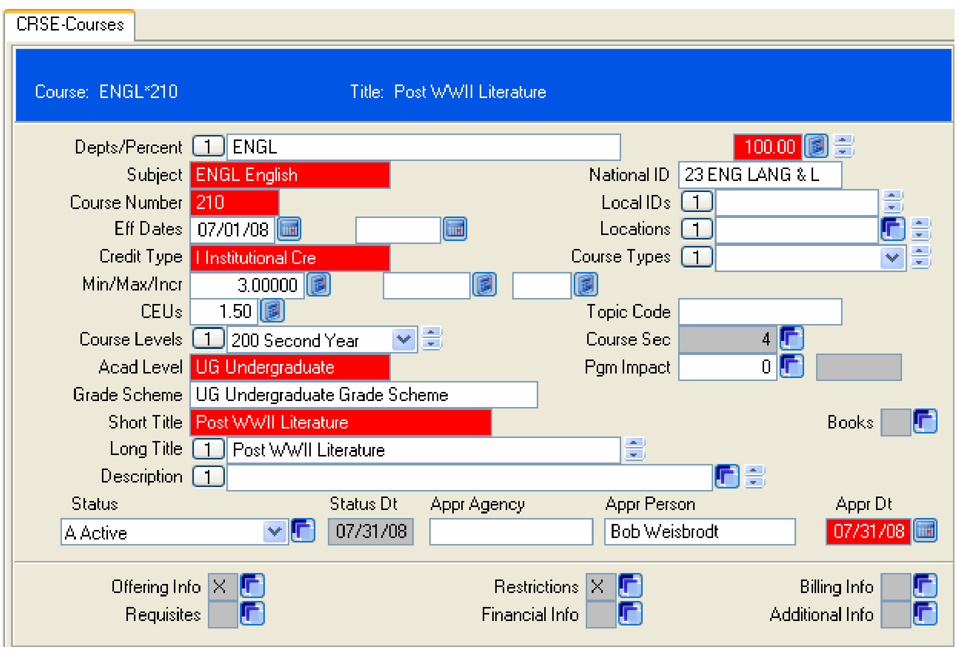
Before You Begin

Before you define characteristics for a course, you must create the course in Colleague. See "Creating New Courses" beginning on page 55 for the procedure.

Defining Basic Course Characteristics

The main form for defining course characteristics is the Courses (CRSE) form. Figure 11 shows the CRSE form completed for an example course.

Figure 11: Example of the Courses (CRSE) Form



Noteworthy Fields on the CRSE form

The fields described in this section are particularly important when you define course characteristics. See online help for additional information about fields on this form.

- **Eff Dates.** The dates in this field define the start and end dates of the course's availability. You can finish from the CRSE form without entering either of these dates, but you cannot create a section from a course that has no start date. You can, however, leave the course end date blank. This is a good practice unless you have a reason to make the course unavailable after a certain date.

- **Min/Max Cred.** If the course is a fixed credit course, enter the number of credits in the first part of this field. If the course is a variable credit course (can be taken for different numbers of credits), put the minimum credits in the first part of the field and the maximum credits in the second part of the field.
- **Short Title.** The short title, rather than the long title, appears on student transcripts generated from the Transcript Print (TRAN) form.
- **Status.** Colleague maintains a history of the status of the course. You can detail to the Course Status History (CSTH) form to view and modify the course's historical status changes. When you create sections from a course record, you can only create sections from a course with a status of "Active."
- **Locations.** This field serves two purposes: You can use it to limit the locations where the course can be offered, and you can detail to the Course Restrs by Location (CLRS) form to define registration restrictions for the course that apply only to a particular location. When you schedule sections for this course, the locations you enter in this field have the following effect:
  - If you list one or more locations, sections can be scheduled at any of those locations.
  - If you enter exactly one location, then that location will default into the Location field on the Sections (SECT) form when you create a section from this course.
  - If you list no locations, then the section can be scheduled at any location defined for your institution.
- **Compatibility with the Degree Audit module.** Your institution may use the Degree Audit module to evaluate a student's progress toward completing a program. Some course characteristics defined on the CRSE form can be used to determine which courses are considered when performing Degree Audit evaluations. If your institution uses the Degree Audit module, then your course characteristics must be compatible with your use of the Degree Audit module.

The following fields on the CRSE form have an impact:

- **Credit Type.** Your transcript groupings may include credit type as one of the criteria for selecting courses for Degree Audit evaluations. Credit type is also used in determining how courses are used in calculating GPA.
- **Course Levels.** Course levels can be directly referenced as a limiting criteria in a Degree Audit evaluation. This field is multivalued, so you can assign more than one course level to a course.
- **Course Types.** Course type can be referenced in a Degree Audit rule.
- **Eq Codes.** The Degree Audit evaluator looks for equated courses when determining whether a student has met a requirement for taking a course. For example, an academic program might have a requirement that a student take Math 101. If Math 101 is equated to Math 110, then a student who has taken Math 110 but not Math 101 would have satisfied the requirement.

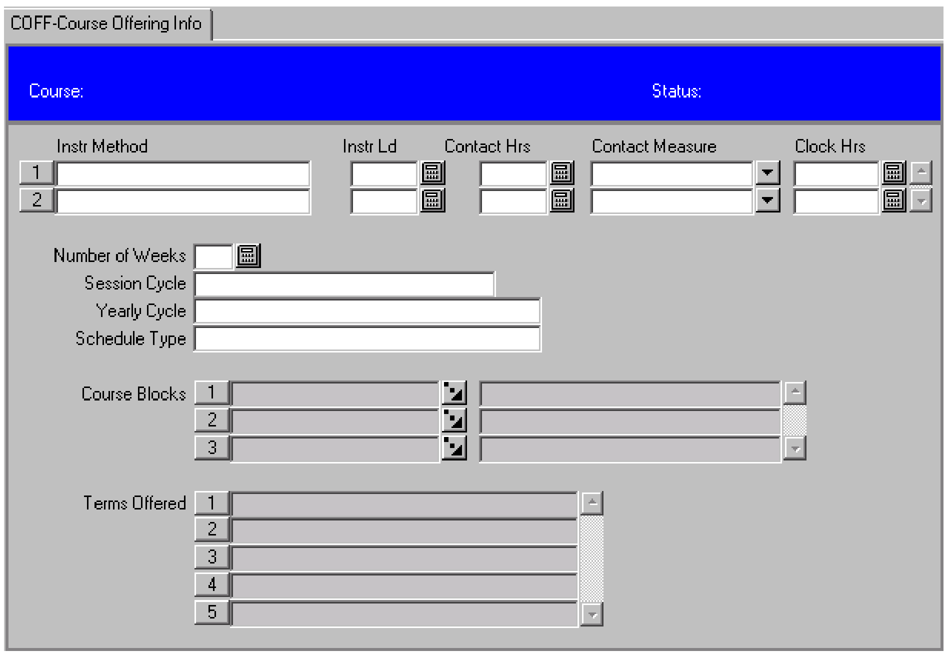
- **Books.** Allows you to detail to the Books (BOOK) form, where you can view, add, or remove books or similar course materials from an associated course or section.

When you create a section from a course, many of the course characteristics defined on the CRSE form default to the section. You can accept the defaults or change them for the section (see "Defining Basic Section Characteristics" beginning on page 114).

Defining Course Offering Information

Use the Course Offering Info (COFF) form, shown below, to record offering information for a course, such as instructional method and load information, session cycles, and yearly cycles in which the course is offered.

Figure 12: Course Offering Info (COFF) Form



You can access the COFF form from the Offering Info field on the CRSE form or from the menu. The information you enter on the COFF form defaults to the sections that you create from the course.

When you create a course, Colleague automatically enters workload defaults defined on the Course/Section Defaults (CDEF) form. You can override those defaults by entering other information.

When you create a section from a course, the course offering information defaults to the section. You can accept the defaults or change them for the section (see “Scheduling Sections” beginning on page 125).

Defining Course Requisites

Understanding Course Requisites

Some courses require that a student complete other work, either before taking the course or while taking the course. In Colleague, these requirements are called *requisites*. Course requisites include prerequisites, corequisite courses, and corequisite noncourses.

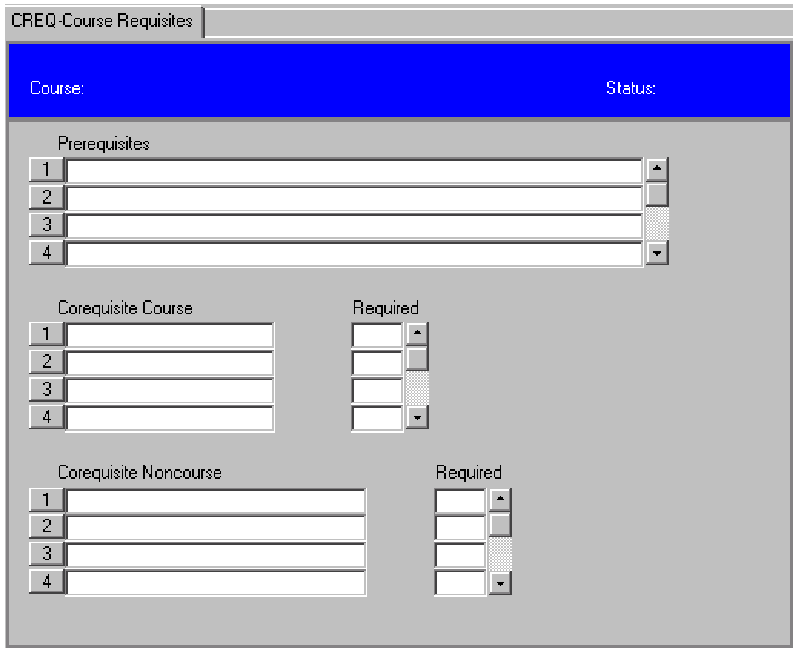
Prerequisites are courses that a student must complete before registering for this course. For example, a student might need to complete Math 101 before registering for Math 102. You can specify a single course as a prerequisite, or you can use Degree Audit syntax to specify multiple courses or alternate courses.

Corequisite courses are courses that a student should take at the same time as this course. For example, a student might need to take a physics lab course at the same time as a physics lecture course.

Corequisite noncourses are tests or life experiences that a student should take at the same time as this course. For example, a student might need to perform 40 hours of community service while taking a public law class.

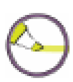
Use the Course Requisites (CREQ) form to record requisites for a course. You can access the CREQ form directly from the menu or by detailing from the Requisites field on the Courses (CRSE) form.

Figure 13: Example of the Course Requisites (CREQ) Form



For corequisite courses and noncourses, you can choose whether or not to make the corequisite a requirement:

- If you enter **`Yes`** in the Required field, the corequisite is required. Colleague will not permit you to register a student for the course unless the student is registered for the corequisite.
- If you enter **`No`** in the Required field, the corequisite is optional. If you try to register a student for this course, and the student is not registered for the corequisite, Colleague will display a warning message about the optional corequisite but will still permit you to register the student.



Note: Colleague allows institutions to assign override authority to staff members who register students. Depending on your level of override authority, you may be able to register students even if they have not met the prerequisites or required corequisites for a course. See the "Registration" section of *Getting Started with Colleague Student* for a discussion of assigning registration controls.

When you create a section from a course, the course requisites defined on the CREQ form default to the section. You can accept the defaults or change them for the section (see "Defining Section Requisites" beginning on page 117).

Defining Course Requisites

Use the Course Requisites (CREQ) form to define prerequisites, corequisite courses, and corequisite noncourses for a specific course. Refer to online help for information about the fields on the CREQ form.

Procedure for Allowing a Test Score to Satisfy a Prerequisite

In some cases, you may want to allow a student to satisfy a prerequisite by either completing a course or achieving a minimum score on an admissions test. For example, your institution might require that, before taking Math 102, a student either complete Math 101 or achieve a score of 600 on the Math SAT. You cannot directly define a test score as a prerequisite in Colleague. (This is because you define prerequisites using Degree Audit syntax, which does not support test scores.) However, you can indirectly define a test score as a prerequisite. The following procedure shows an example of how you can define a test score as a prerequisite.

Step 1. On the Noncourses (NONC) form, define the admissions test as a noncourse in Colleague.

Example: Define the Math SAT as a noncourse named, for example, "SATM."

See the "Recruitment/Admissions Management" section of *Getting Started with Colleague Student* for the procedure for defining noncourses.

Step 2. On the Courses (CRSE) form, create a "dummy" course.

You will not create sections or register students for this course; its only purpose is to stand in for the admissions test as a course prerequisite.

Example: Create Math 199 as a "dummy" course.

See "Creating New Courses" beginning on page 55.

Step 3. On the Noncourse Equivalencies (NONE) form, define an equivalency between the noncourse (admissions test) and the dummy course you just created.

Example: On the Noncourse Equivalencies (NONE) form:

a. At the Noncourse LookUp prompt, enter **`SATM`**.

b. In the Equivalent Course field, enter **`Math 199`**.

c. In the Min Score field, enter **`600`**.

See the "Recruitment/Admissions Management" section of *Getting Started with Colleague Student* for the procedure for defining noncourse equivalencies.

Step 4. On the Noncourse Equiv Evaluation (NEQV) form:

Example: Assign a credit type of "N" (non-credit).

- In the Credit Type field of the Equivalent Course table, assign a credit type that ensures that the dummy course will not appear on the student's transcript or be included in Degree Audit evaluations.[1]

Example: Assign a status of "TR" (Transfer Equiv Eval) or "NC" (Noncourse Equivalency).

- In the Status field of the Equivalent Course table, assign a status with a special processing code of 7, which indicates approved transfer credit.[2]

1. As an alternative, you can assign a credit type in the Credit Type field on the NONE form (Step 3). However, the credit type would apply to all equivalencies defined for that noncourse.
2. As an alternative, you can assign a status in the Dflt Status field on the NONE form (Step 3). However, the status would apply to all equivalencies defined for that noncourse. Also, some institutions prefer to assign a preliminary status on the NONE form, and assign an approved status on the NEQV form after a review of the equivalency for that student.

Step 5. On the Course Requisites (CREQ) form:

a. Access the course for which you want the admissions test to be a prerequisite.

b. In the Prerequisites field, define the dummy course as a prerequisite.

Example: On the Course Requisites (CREQ) form:

c. At the Course LookUp prompt, enter **`Math 102`**.

d. In the Prerequisites field, enter the following:

```
Take Math*101 or Math*199
```

You can use a similar procedure to determine whether a student needs to take a remedial course. For example, your introductory English course for all first-year students might be English 101, but you might require any student who had not scored at least 475 on the English SAT to take a remedial course (English 010) first. In that case, you would equate the noncourse (English SAT) to English 010, and define English 010 as a prerequisite for English 101. When you attempt to register an incoming first-year student for English 101, Colleague would prevent the registration, and would notify the user that the remedial course was a prerequisite, if the student had not achieved a score of at least 475 on the English SAT.

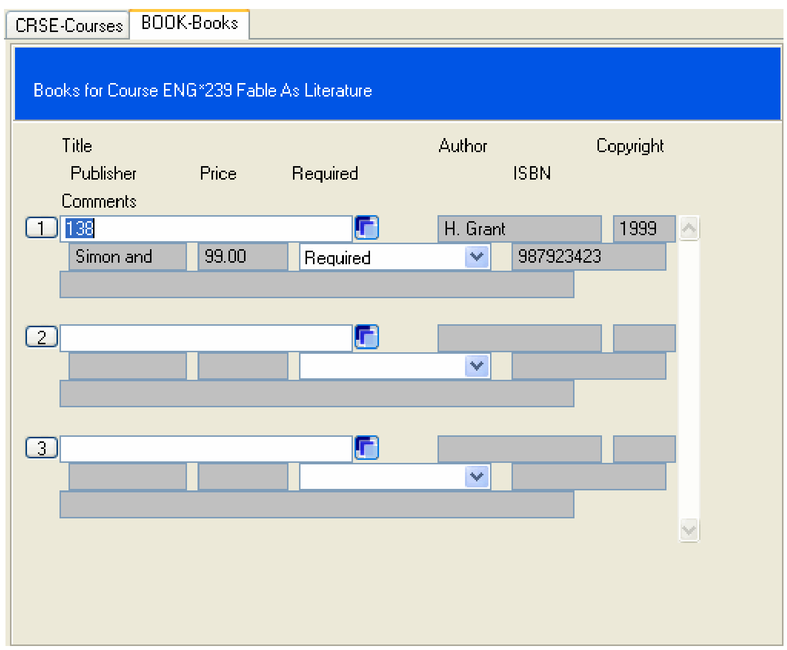
Defining Books and Course Materials

Use the Books (BOOK) form to view, add, or remove books or similar course materials from an associated course or section. You can also use this form to set the status of the material that is associated with the course or section.

You can detail to the BOOK form from the Books field on the Courses (CRSE) and Sections (SECT) forms.

You can also use the BOOK form to detail to the Book Detail (BKDT) form, where you can enter or modify information about books and course materials in Colleague. All materials must have a title. If the material does not have an ISBN associated with it, then the Author, Publisher, and Copyright date fields must be included.

Figure 14: Books (BOOK) Form



Noteworthy Fields on the BOOK Form

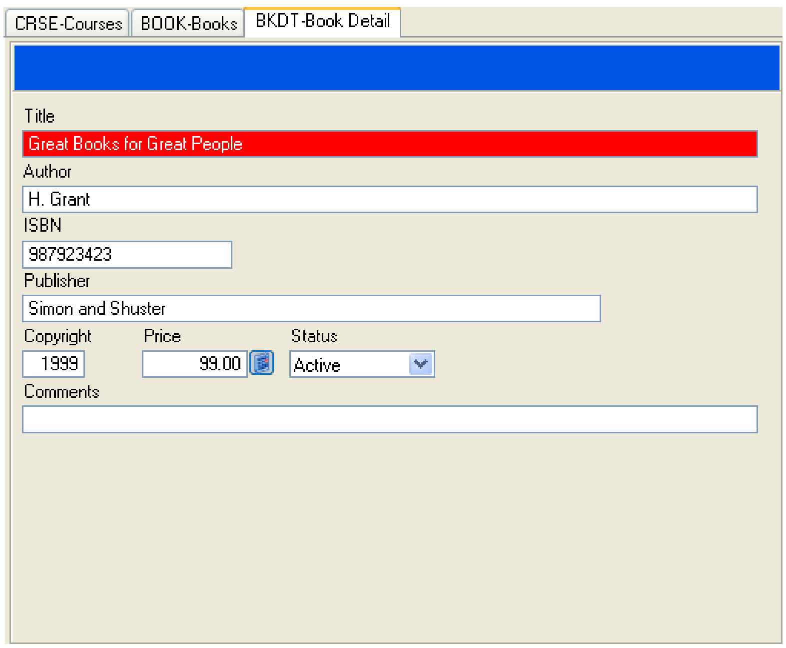
Title

Enter the title for the book or course material. You can also use this field to detail to the Book Detail (BKDT) form, where you can enter or modify information about books in a database.

Required

Indicate whether this book or material is required for the course.

Figure 15: Book Detail (BKDT) Form



Noteworthy Fields on the BKDT Form

Title

Enter the title of a book or course material.

Author

Enter the name of the author of the book or course material. You can enter a single author, or several.

ISBN

Enter the ISBN (International Standard Book Number) of the book or course material. This is not required, but if the book has no associated ISBN, then the Author, Publisher, and Copyright fields must be entered.

Publisher

Enter the name of the publisher of the book or course material.

Copyright Date

Enter the date the book our course material was copywritten. If the material does not have an ISBN associated with it, this field is required.

Price

Enter the estimated price that a student can expect to pay for the book or course material, such as the MSRP value.

Status

Use this field to choose whether the book or course material should be considered active or inactive. Inactive books will not be displayed on the Lookup form when a book is added from the Maintain Books form in WebAdvisor.

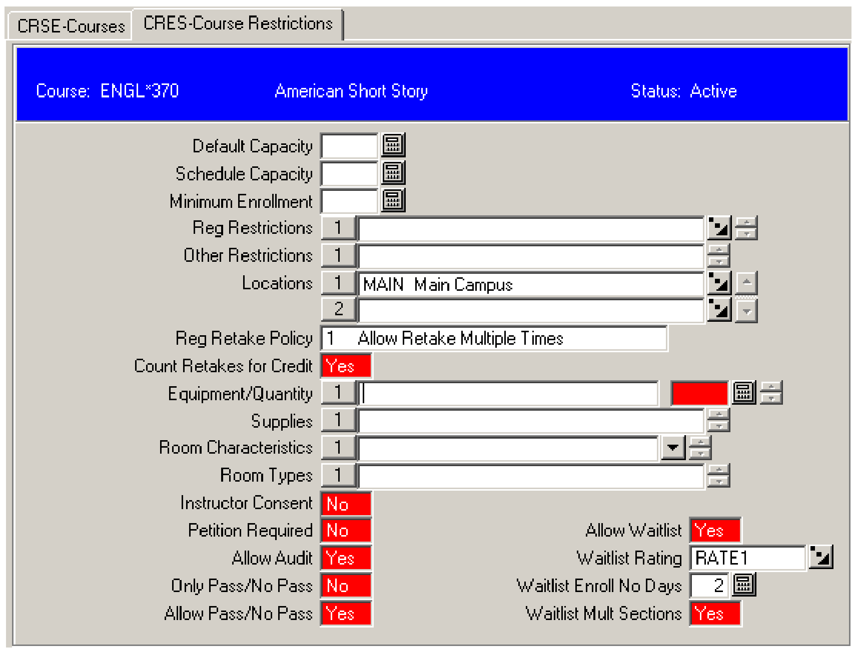
Comments

Enter comments that should be associated with the book or course material.

Defining Course Restrictions

Course restrictions are registration and scheduling limitations on each section created from a course. Use the Course Restrictions (CRES) form, shown below, to define restrictions for a course. You can access the CRES form from the menu or by detailing from the Restrictions field on the Courses (CRSE) form.

Figure 16: The Course Restrictions (CRES) Form



When you create a course, Colleague fills some of the fields on the CRES form with default values. Some of these are Colleague defaults, and some are default values which your institution establishes during Student System setup. Table 5 lists those fields, along with the place where the default values are established.

Table 5: Default Fields on the Course Restrictions (CRES) Form

Field on the CRES Form	Where Default Value is Defined	
	Form	Field
Reg Retake Policy	Departments (DEPT)	Default Reg Retake Policy
Count Retakes for Credit	Default is “No” (Colleague default)	
Instructor Consent	Course/Section Defaults (CDEF)	Instructor Consent

Table 5: Default Fields on the Course Restrictions (CRES) Form (cont'd)

Field on the CRES Form	Where Default Value is Defined	
	Form	Field
Petition Required	Default is "No" (Colleague default)	
Allow Audit	Course/Section Defaults (CDEF)	Allow Audit
Only Pass/No Pass		Only Pass/No Pass
Allow Pass/No Pass		Allow Pass/No Pass
Allow Waitlist	Waitlist Defaults (WLDF)	Allow Course Waitlist Default
Waitlist Rating		Waitlist Rating Default
Waitlist Enroll No Days		Enroll Number of Days Default
Waitlist Mult Sections		Multiple Sections Default

Noteworthy Fields on the CRES form

The fields described in this section are particularly important when you create course restrictions. See online help for additional information about fields on this form.

- **Reg Retake Policy.** The registration retake policy dictates how many times a student may take a course. During registration, Colleague will check the student's academic record and the retake policy for a course before registering a student for a course. Colleague will enforce your institution's retake policies, disallowing registration that violates a course's retake policy.
- **Count Retakes for Credit.** Your entry in this field determines how the student's records are affected if they retake the course:
  - If you enter **`Yes`**, the student receives credit for each successful completion of this course. For example, if the course is a two-credit course and the student takes it three times, the course appears as three two-credit courses totaling six credits.
  - If you enter **`No`**, then Colleague uses the grade scheme rules associated with the course to determine which grade to count. For example, you may have a course whose rules specify that only the best grade counts.
- **Allow Waitlist**, **Waitlist Rating**, **Waitlist Enroll No Days**, and **Waitlist Mult Sections.** For information about these fields, see "Defining Waitlist Criteria" beginning on page 165.

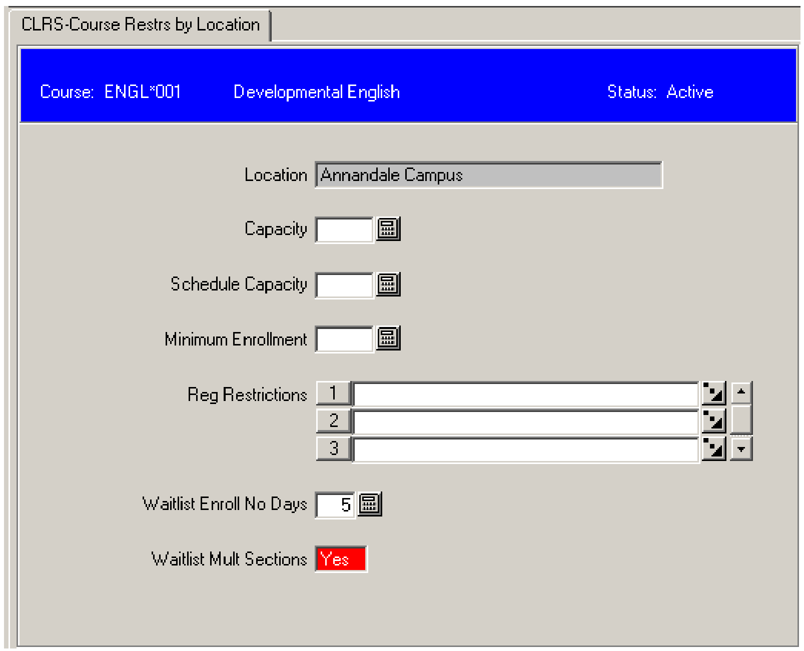
When you create a section from a course, the course restrictions defined on the CREQ form default to the section. You can accept the defaults or change them for the section (except that you cannot change "Count Retakes for Credit" for the section). See "Defining Section Restrictions" beginning on page 119.

Defining Location-Specific Restrictions

You can define location-specific registration restrictions using the Course Restrs by Location (CLRS) form.

You can record registration restrictions or detail to the Rules Definition (RLDE) form to view and maintain rules regarding restrictions for this location. You can create a restriction record for each location where a course is valid.

Figure 17: Course Restrs by Location (CLRS) Form



You can access the CLRS form from the menu, by detailing from the Locations field on the Courses (CRSE) form, or by detailing from the Locations field on the Course Restrictions (CRES) form.

Procedure for Defining Course Restrictions

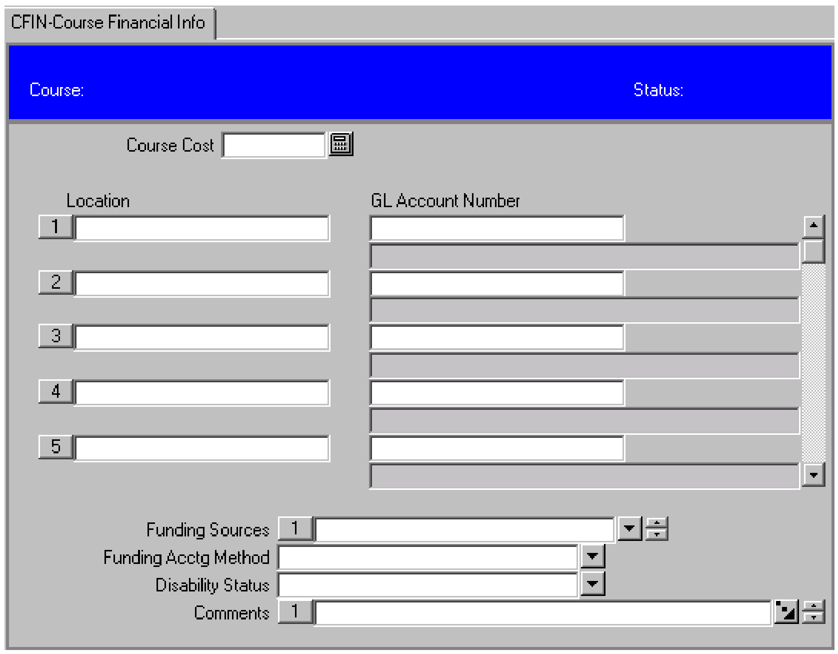
Use the Course Restrictions (CRES) form to define restrictions for a course. Refer to "Course restrictions are registration and scheduling limitations on each section created from a course. Use the Course Restrictions (CRES) form, shown below, to define restrictions for a course. You can access the CRES

form from the menu or by detailing from the Restrictions field on the Courses (CRSE) form." on page 72 and online help for information about the fields on the CRES form.

Defining Course Financial Information

You can use the Course Financial Info (CFIN) form, shown below, to record information about costs to your institution of offering a course. You can access the CFIN form from the menu or from the Financial Info field on the CRSE form.

Figure 18: Course Financial Info (CFIN) Form



Noteworthy Fields on the CFIN form

The fields described in this section are particularly important when you record information about costs to your institution of offering a course. See online help for additional information about fields on this form.

- **Funding Sources**, **Funding Acctg Method**, and **Disability Status.** These fields are used primarily for state reporting. If you are using Colleague to prepare state reports, see the Colleague documentation for your state. For example, if you are preparing state reports for California, see *Using California State Reporting*.

When you create a section from a course, the course financial information defaults to the section. You can accept the defaults or change them for the section (see “Defining Section Financial Information” beginning on page 121).

Defining Course Billing Information

Use the Course Billing Information (CRSB) form to define billing information for the course. You can access the CRSB form from the menu or from the Billing Info field on the Courses (CRSE) form. See the Accounts Receivable section of *Getting Started with Colleague Student* for procedures for defining billing information on the CRSB form.

Defining Additional Course Information

From the Additional Info field on the CRSE form, you can detail to either of two forms:

- The Additional Course Information (ACOI) form allows you to record course information for state reporting. If you are using Colleague to prepare state reports, see the Colleague documentation for your state. For example, if you are preparing state reports for California, see *Using California State Reporting* for procedures for using the ACOI form.
- The Schedule 25 Course Info (S2CO) form allows you to record course information for use with Schedule 25, a third-party application which some institutions use for batch room scheduling.

Changing Course Definitions

Understanding Course Definition Changes

You may find it necessary to modify how your courses are defined. This may involve changing the numbering sequence of some courses, the course name, the course title or basic course content. It is important that you understand the proper way to do this, so that you do not unintentionally delete vital information from your database. Although you may make modifications to an existing course definition, do *not* delete the record. This will lead to corrupt data in student records.

ALERT! Do not delete a course that exists in any student's academic record or has been referenced in an academic requirement. If you do, all references to the course will become unreadable.

The proper way to make each of these changes is described in the following sections.

Before you change course definitions, you should understand the two types of identifiers (course name and course ID) used in Colleague. See "Course Names and IDs" beginning on page 49 for a discussion.

Course Number and Name Changes

You may find that your institution wants to modify an existing course by changing its number or its name. For example, Datatel University wanted to change the course “Introduction to Calculus” from MATH*288 to MATH*200, but wanted to preserve the history of it in the records of students who had taken the course. Because the course was used in several academic requirements, DU also wanted to keep the ability to correctly evaluate whether those requirements had been met.

You can change the name of a course without affecting past records. A student’s records contain the course name as it was defined at the time the student took the course. For example, if John Blair took “Introduction to Calculus” when the course name was MATH*288, his record stores that name even if the course name is later changed to MATH*200. The course name at the time John took the course is the one that prints on his transcripts and Degree Audit evaluations.

When you want to change the number of a course, access that course on the Courses (CRSE) form and change its number. The content of the course does not change and therefore all student records and academic requirements which reference that content are still correct. When you file the record, the system changes the course’s name using the new course number.

In the example above, DU accessed the course MATH*288 on the CRSE form. The new number, 200, was entered in the Course Number field. When the course record was filed, the course name was changed to MATH*200.

You do not need to modify any of the academic requirements referencing this course. Colleague references these course records internally and not by the course name. All academic requirements which had been previously entered as “Take MATH*288,” will now display, and evaluate, correctly as “Take MATH*200.”

Note: Do not delete a course which exists in any student’s academic record.

Procedure for Changing Course Numbers and Names

Complete the following steps to change the number or name of a course:

Step 1. Familiarize yourself with the process of changing course numbers and names.

Read “Course Number and Name Changes” on page 80.

Step 2. Access the course record on the Course (CRSE) form.

Step 3. In the Course Number field, enter the new number.

Step 4. Update the record.

Colleague stores the course record with the new course name: Course Subject/ Delimiter/Course Number.

See “Course Names and IDs” on page 49 for more information about how Colleague constructs the Course Name.

Course Content Changes

Occasionally, you may have a situation where a course changes so significantly from one term to another that you no longer want students to be able to use the old and new versions interchangeably to meet prerequisites. For example, Datatel University decided the course CMSC*200, “Introduction to Computers,” needed to be revamped. This new version was different enough that some new academic requirements were needed which specifically required this new version of the course. DU actually had two different courses to deal with now. The different content in the new version was really equivalent to a new course.

When you make a change to the content of a course, you need to create a new course record. You must do this to preserve the old version for the sake of all the students who took that version.

ALERT! Do not delete the old version of the course! It is essential for maintaining the accuracy of student records

You can choose to either:

- Create a new course with a previously unused course name. Datatel recommends this method, if possible.
- Create a new course, but use the same course name. Colleague gives each record a separate course ID and is able to distinguish between them.

Both options are discussed in the following sections.

Create the New Course with New Name

Datatel recommends that you create the new course with a previously unused course name, such as CMSC*200B. This makes it trivial to specify academic requirements differently. DU had academic requirements that stated, “Take CMSC*200,” and easily added a new requirement which stated, “Take CMSC*200B.”

Create the New Course with Same Name

Another approach is to create the new course using the existing course subject and number. When you file this record, Colleague gives the new course the same name as the old version, but a unique internal course ID. All old requirements which reference the old course will still look for, and find, the old course. If you create new requirements referencing the course name, Colleague displays a resolution form and asks you to select the appropriate course. The new requirement stores the course ID and is able to distinguish between the two courses when they are on a student's record.

Procedure for Changing Course Content

Complete the following steps to significantly change course content:

Step 1. Familiarize yourself with the process of changing course content.

Read "Course Content Changes" on page 82.

Step 2. Decide whether you want to create your new course with a unique name or use the same name.

To understand the ramifications of each option, see "Create the New Course with New Name" on page 82 and "Create the New Course with Same Name" on page 83.

Step 3. Access the Courses (CRSE) form.

Step 4. At the Course LookUp prompt, enter the subject for the course.

Colleague uses the course subject in combination with the course number to produce the course name.

Step 5. Go to the Course Number field.

Step 6. Depending upon your decision in Step 2, enter either:

- The same course number as the existing course
- A different, and unique, course number

Datatel recommends that you use a unique course number.

Step 7. Finish defining the course.

See "Defining Course Characteristics" beginning on page 59.

Step 8. Update the record.

De-activating a Course

If your institution decides not to offer a course anymore, access the course record on the CRSE form and change the status to "inactive." If you want to change the status for a section, access the section on the Sections (SECT) form and change the section's status. If you want to change the statuses of a group of sections, see "Changing Section Statuses" beginning on page 149.

ALERT! Do not delete the inactive course record, because there still may be some academic requirements that reference it and there may be students who reference the course in their academic records.

Working With Courses

This section contains information about the following tasks:

- "Equating Courses" beginning on page 87 tells you how to equate two courses which you have given different names but which are otherwise identical.
- "Grouping Courses for Registration" beginning on page 89 briefly describes the forms you use to create course blocks and curriculum tracks. Detailed procedures for these tasks are in *Using Block Registration*.

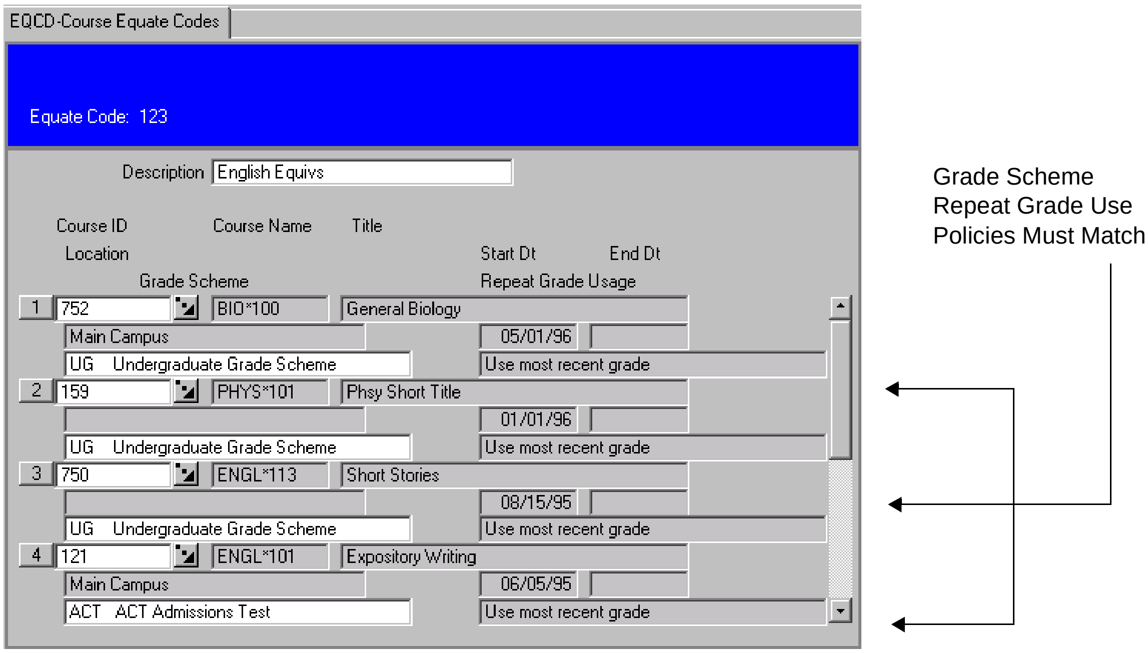
Equating Courses

Understanding Equated Courses

Your institution may offer two or more courses that cover the same material but are titled and numbered differently. Each course may be substituted for the other to satisfy an academic program requirement or a course requisite. In Colleague, you use equate codes to identify courses as equivalent. You equate courses on the Course Equate Codes (EQCD) form, shown in Figure 19.

Note: The courses on an equate list must have the same repeat grade usage policy associated with their grade schemes. The repeat grade usage policy determines which grade to use if a student has retaken a course. For more information about grade schemes and repeat grade usage policies, see *Getting Started with Colleague Student* and *Using Academic Records*.

Figure 19: Course Equate Codes (EQCD) Form



You can equate courses to the course you are working with by detailing to the EQCD form from the Eq Codes field on the Courses (CRSE) form. You can also access the EQCD form from the menu.

Course equate codes affect both the registration process and the academic program evaluation process. When you register a student for a course, Colleague will compare the student's record to the course and to the courses listed on the EQCD form to determine if the student has previously taken the course or an equivalent. When you use the Degree Audit module to perform an academic program evaluation, the evaluator checks each course on a student's record including the equated courses to determine if the program requirements have been met.

Procedures for Equating Courses

Use the Course Equate Codes (EQCD) form to equate courses. Refer to "Understanding Equated Courses" on page 87 and online help for information about the fields on the EQCD form.

Grouping Courses for Registration

You may want the students in some of your academic programs to take a set of related courses. In Colleague, you can group such courses in course blocks, so that you can easily register the students for all of the courses in the block. From the Courses menu in Colleague, you can access three forms related to grouping courses for registration:

- The Course Block (CSBL) form allows you to define the course block, which is used as a template for section blocks. A section block is the actual group of sections assigned during block registration.
- The Curriculum Track (CUTK) form allows you to define a curriculum track, which is a sequence of course blocks. A course block can be used within more than one curriculum track.
- The Curriculum Track View (CUTV) form allows you to view a list of the course blocks which make up a particular curriculum track, along with a list of students assigned to that curriculum track.

For the procedures for defining course blocks and curriculum tracks, see *Using Block Registration*.

Viewing and Reporting Course Information

This section tells you how to generate on-screen or printed reports of course information. Table 6 lists the types of information available, the Colleague forms you use to view or report the information, and the section of this chapter which describes the procedure.

Table 6: Procedures for Viewing and Reporting Course Information

To view or report this information...	Use this form...	Reference
View all of the programs which use a particular course as part of a requirement.	Program Impact Summary (PIMS)	“Viewing a List of Programs Associated With a Course” on page 92
View or print a list of courses and course characteristics.	Course List (CRSL)	“Generating a List of Courses” on page 93
Print a catalog of courses offered by your institution.	Course Catalog (CCAT)	“Generating a Course Catalog” on page 95

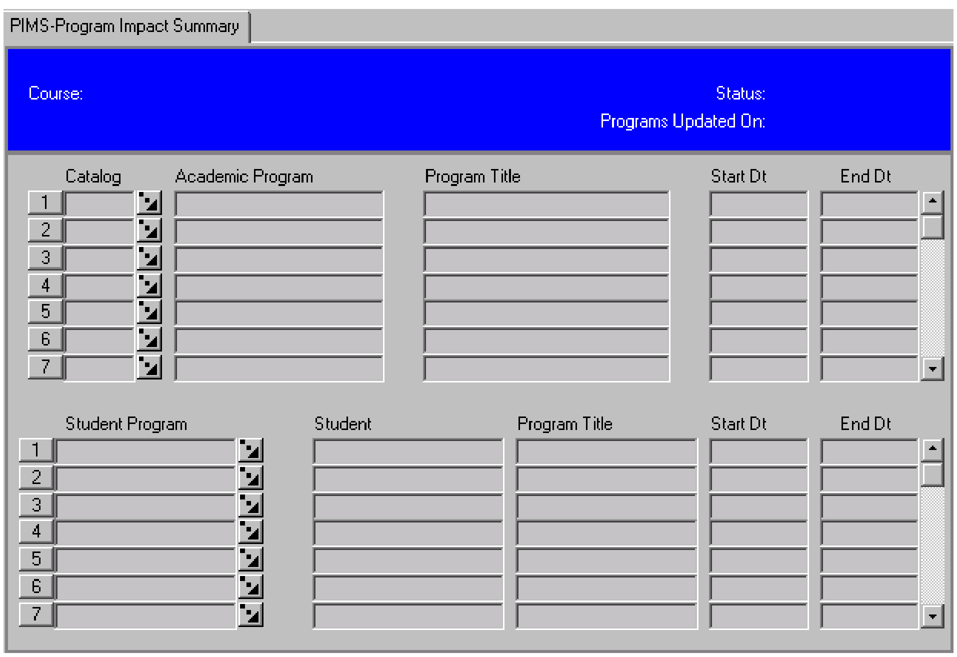
Viewing a List of Programs Associated With a Course

If you make changes to a course, you may affect programs that use the course to fulfill one or more requirements. You can view a list of all academic programs and student (customized) programs associated with a course. It is a two-step process:

1. Build (or rebuild) the course-to-programs relationships file in Colleague using the Build/Rebuild Course Programs (CPRO) form. This step is unnecessary if you are certain that these relationships are unchanged, for the course in which you are interested, since the relationships file was last built.
2. View the programs associated with a course using the Program Impact Summary (PIMS) form.

The CPRO form is self-explanatory and is not shown here. Figure 20 shows the PIMS form.

Figure 20: Program Impact Summary (PIMS) Form

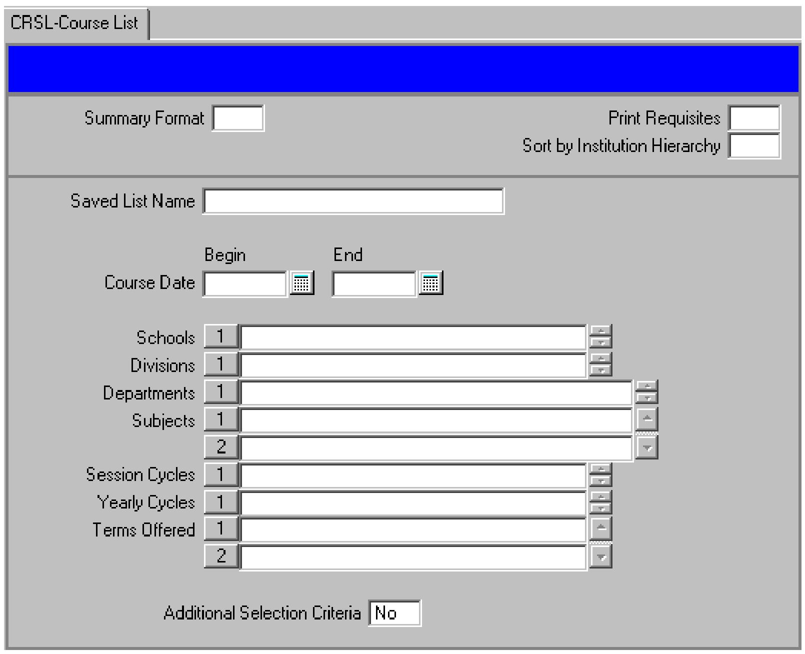


You can access the PIMS form from the menu or by detailing from the Pgm Impact field on the Courses (CRSE) form. The PIMS form is inquiry only.

Generating a List of Courses

You can print or view a report of courses and course characteristics using the Course List (CRSL) form, shown below.

Figure 21: Course List (CRSL) For



Noteworthy Fields on the CRSL form

The fields described in this section are particularly important when printing or viewing a report of courses and course characteristics. See online help for additional information about fields on this form.

- **Summary report.** If you enter `Yes` in the Summary Format field, Colleague will print a summary report with just a few key pieces of information about each course. For this option, you must also enter values in the following fields:

- Enter **`Yes`** in the Print Requisites field if you want to see course prerequisites and corequisites as part of the report. If you enter **`No`**, Colleague will not print requisites.
- Enter **`Yes`** in the Sort by Institution Hierarchy field if you want the report sorted by school, division, and department. If you enter **`No`**, Colleague will list all of the courses in alphabetical order by course name.

■ **Detailed report.** If you enter **`No`** in the Summary Format field, Colleague will print a detailed report about each course. For this option, the Print Requisites and Sort by Institution Hierarchy fields are not available.

In the bottom part of the form, you can (optionally) limit the course list to selected courses by specifying a saved list and/or other limiting criteria. The saved list must select records from the COURSES file.

Generating a Course Catalog

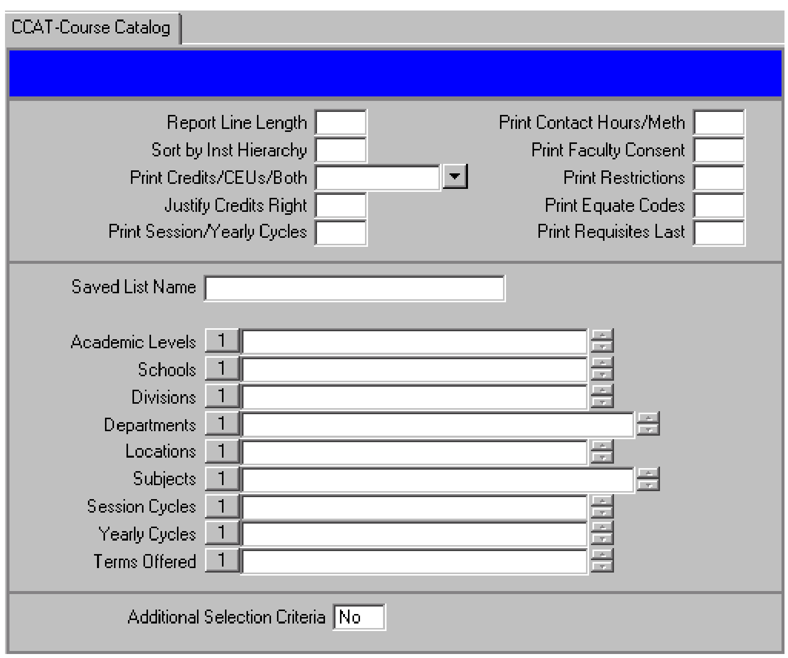
Understanding Course Catalogs

After you have defined your courses, you may want to produce a catalog for your students and instructors to use as a reference. You can choose to print the entire offering of courses or print smaller catalogs for each campus, school, division, department, or academic term. You can publish your catalog online or import the information into a word processor for manipulation before publishing.

Note: In Colleague, the word “catalog” has two separate meanings, both related to curriculum. In one definition, a catalog is a group of academic programs offered during a specific time period, typically an academic year (see the discussion in “Understanding Academic Programs” on page 25). The other definition is a course catalog, discussed in this section.

Use the Course Catalog (CCAT) form, shown below, to generate a course catalog. You can access the CCAT form from the menu.

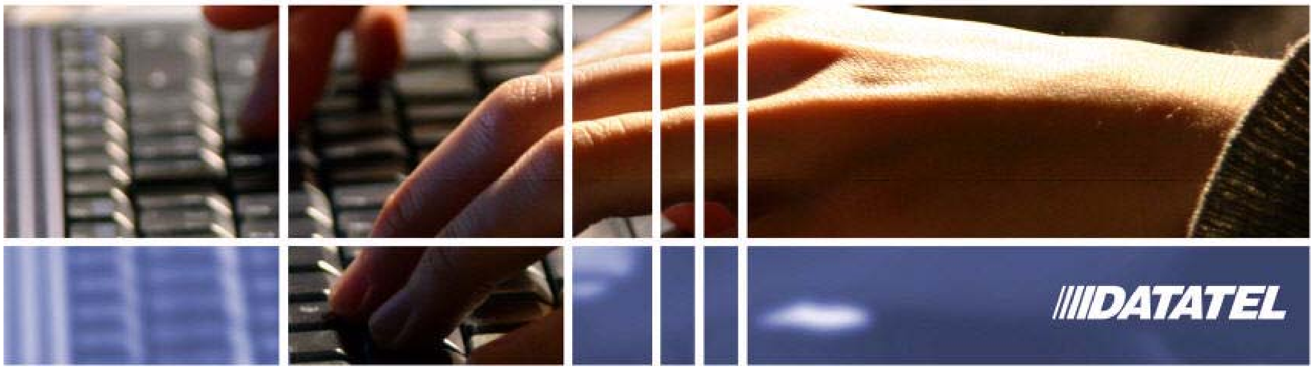
Figure 22: Course Catalog (CCAT) Form



The CCAT form is divided into two parts: report instructions and course selection criteria.

Report instructions, on the upper part of the CCAT form, define the format of the catalog and the information to be included for each course. All of the report instructions fields are required.

Selection criteria define the courses you want to include in your course catalog. You can enter the name of a saved list of records from COURSES file.



Using Curriculum Management

Sections

Section Basics

In This Chapter

This chapter provides procedures for creating and maintaining sections. Included are procedures for the following tasks:

- "Creating Sections" beginning on page 103 describes the three ways to create a section: from a course, by copying an individual section, or by copying sections in batch.
- "Defining Section Characteristics" beginning on page 113 tells you how to define characteristics (for example, requisites and restrictions) for a section.
- "Scheduling Sections" beginning on page 125 tells you how to establish a meeting place and time for a section.
- "Making Instructional Assignments" beginning on page 133 tells you how to assign an instructor to teach a section.
- "Working With Sections" beginning on page 147 addresses procedures for cross-listing sections, changing section statuses, and grouping sections for registration.
- "Viewing and Reporting Section Information" beginning on page 153 provides procedures for generating lists and reports of section information, including a section roster and section schedule.

Understanding Sections

Sections, also called course sections, are specific offerings of a course. Your students will enroll in and attend sections of the courses you have defined. Consider the courses you have created as templates for the actual course sections. You can create as many sections for a particular course as you need. More than one section of the same course can be taught during the same academic term, and your institutions can offer the same course term after term.

When you create a section from a course, the section inherits most of the characteristics from the course. However, you can change those characteristics for each section. In addition, you can define information which applies to the section but not to the course, such as meeting places, meeting times, and instructors.

Section Names, IDs, and Synonyms

Colleague uses three types of identifiers for a section: section name, ID, and synonym. When Colleague prompts you for a section at the Course Section LookUp prompt (for example, when you access the Sections (SECT) form), you can enter any of these three identifiers. Each of these identifiers is discussed below.

Section Name—The section name is made up of course name and section number. For example, a section name might be:

ENGL*386*0001

where ENGL*386 is the course name and 0001 is the section number. When you create a section, you assign a section number in the Section field on the Sections (SECT) form. (For a discussion of course names, see “Course Names and IDs” on page 49.)

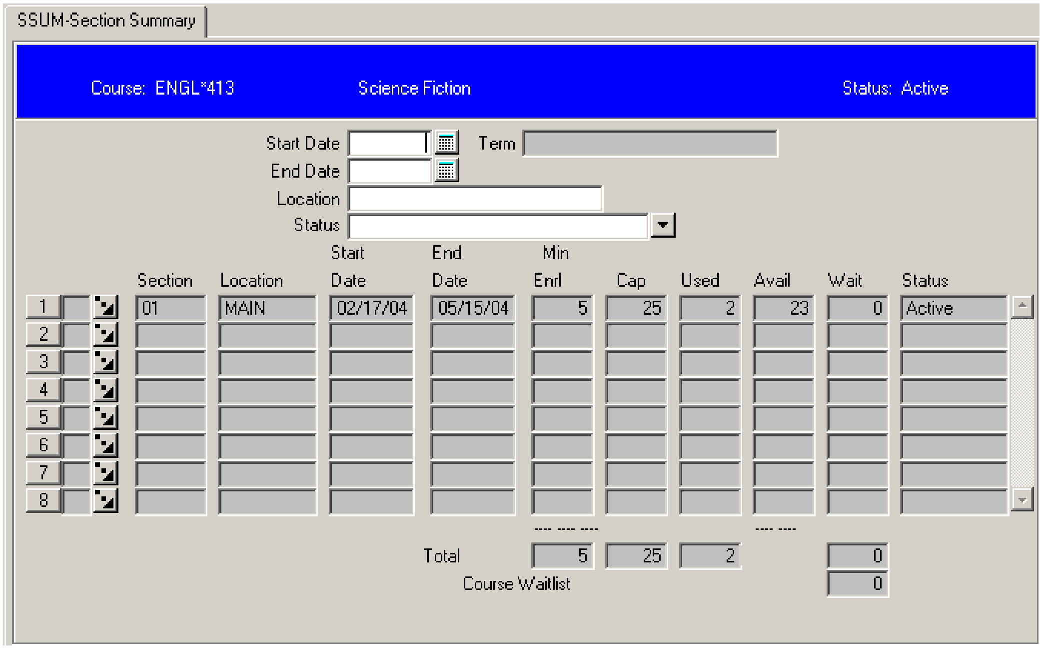
Section ID—When you create a section, Colleague creates a record in the COURSE.SECTIONS file with a unique section ID.

Synonym—A synonym is another numeric ID for a course section that Colleague may use during telephone registration or for registration and grade scanning. Some institutions use synonyms for easier processing or identification. When you set up section defaults on the Course/Section Defaults (CDEF) form, you can define the synonym length and decide whether to have Colleague automatically generate a synonym when you create a section. For details on setting up section defaults, see the Curriculum Management section of *Getting Started with Colleague Student*.

Maintaining Sections from the Section Summary Form

The Section Summary (SSUM) form, shown in Figure 23, is a convenient “home base” for creating, copying, and maintaining sections of a course.

Figure 23: Section Summary (SSUM) Form



You can view all of the sections of a course, or you can use the fields in the top part of the form to limit the list by time period, location, and/or status. For example, you could choose to view only sections in the Winter 2004 term with an “active” status.

From the Section field, you can detail from the line for an existing section to maintain that section, or you can move to a blank line to add a new section. If you detail from the line for an existing section, Colleague prompts you to select one of the following forms:

Table 7: Forms Used to Define Section Characteristics

Detail to this form...	To perform this function...	For information, see...
Sections (SECT)	Define basic section characteristics	“Defining Basic Section Characteristics” on page 114
Section Offering Info (SOFF)	Record offering information about the section	“Scheduling Sections” on page 125
Section Requisites (SREQ)	Define section requisites	“Defining Section Requisites” on page 117
Section Restrictions (SRES)	Define section restrictions	“Defining Section Restrictions” on page 119
Section Financial Info (SFIN)	Define financial information for the section	“Defining Section Financial Information” on page 121

Table 7: Forms Used to Define Section Characteristics (cont'd)

Detail to this form...	To perform this function...	For information, see...
Section Cross-List (SXRF)	Cross-list the section to another section	"Cross-Listing Sections" on page 147
Section Reg Date Ranges (SRGD)	Define registration date ranges	"Setting Registration Date Ranges" on page 123
Section Copy (SCOP)	Copy the section	"Copying an Individual Section" on page 109

Creating Sections

Before You Begin

Before you create sections, you should set up the following:

Table 8: Information Needed Before You Create Sections from a Course

Action	Reference
Courses	"Creating Courses" on page 53.
Communications codes	See *Getting Started with Colleague Student* for more information about defining these codes.
Grade schemes codes	
Instructional methods codes	
Retake policy codes	
Section statuses codes	
Waitlist ratings codes	

Three Ways to Create a Section

You can create a section using any of the following three methods:

- **From a course.** You can create a section directly from a course using the Sections (SECT) form. See "Creating a Section from a Course" on page 105 for the procedure.
- **By copying an individual section.** You can create a section by copying another section, using the Section Copy (SCOP) form. The characteristics of the existing section are copied into the new section. See "Copying an Individual Section" on page 109 for the procedure.
- **By copying a group of sections.** You can copy a group of sections using the Section Batch Copy (SBCP) form. For example, you might want to copy a group of sections from one academic term if you plan to offer the same courses in the next term. See "Copying Sections in Batch" on page 111 for the procedure.

Creating a Section from a Course

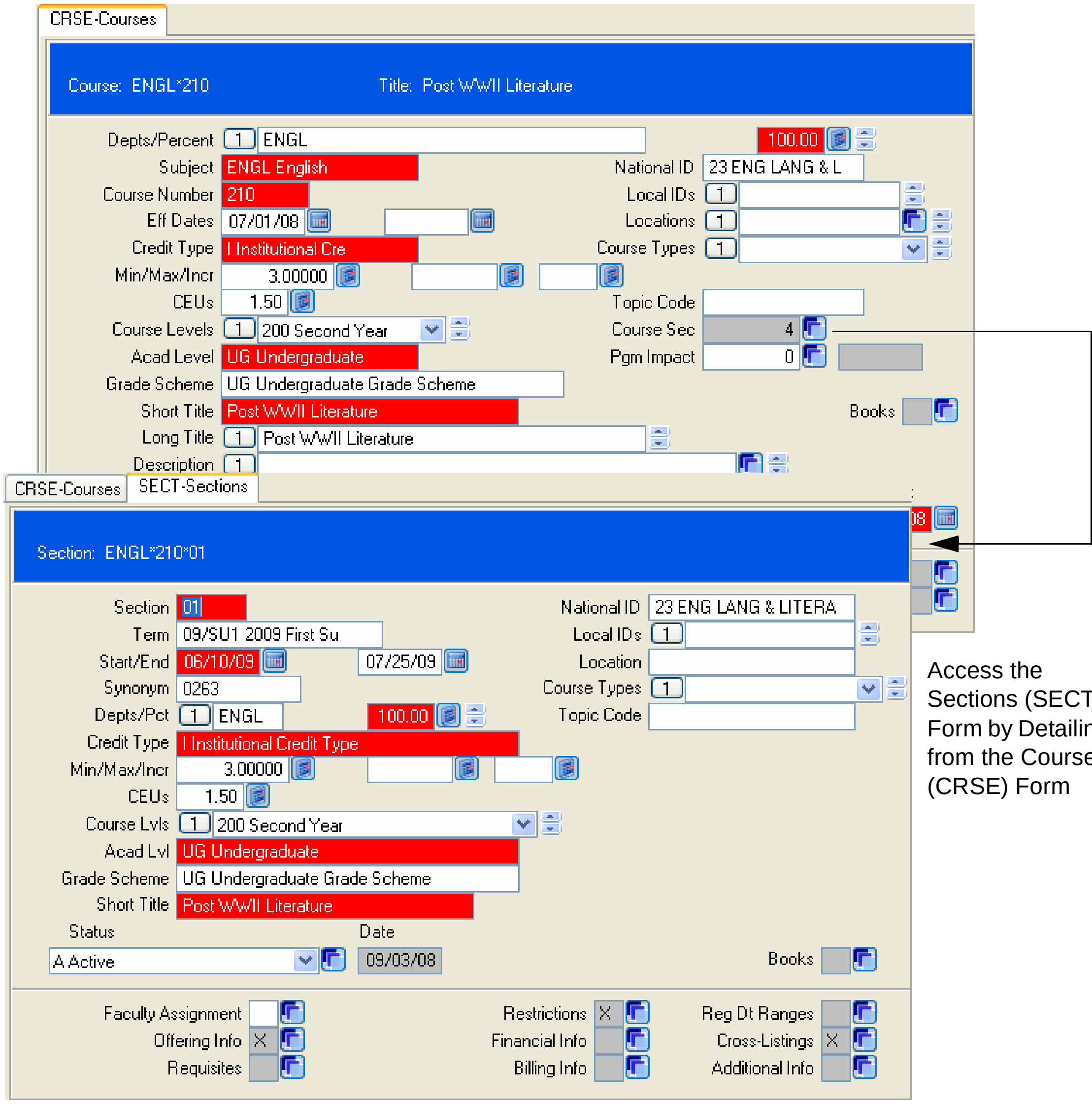
Understanding Creating a Section from a Course

Use the Sections (SECT) form to create a section record from your course. You can access the SECT form directly from the menu, or by detailing from the Course Sec field on the Courses (CRSE) form (see Figure 24 on page 105). You can also access the SECT form to create a section by detailing from a blank line on the Section Summary (SSUM) form.

You can create a section from any course with an “Active” or “Pending” status. If the course has a “Pending” status, you will need to activate the course before the section can become active.

After you have created the section, you can define characteristics for the section. See “Defining Section Characteristics” beginning on page 113 for the procedure.

Figure 24: Sections (SECT) Form



Access the Sections (SECT) Form by Detailing from the Courses (CRSE) Form

Procedure for Creating a Section from a Course

Use either of the procedures in below to create a section from a course.

To create a section by detailing from the Courses form:

Step 1. On the Courses (CRSE) form, access the course for which you want to create a section.

Step 2. Detail from the Course Sec field.

Colleague will display a list of existing sections (if sections have already been defined for the course).

Step 3. Select the "Add" option to create a section.

Colleague will display the Sections (SECT) form.

Step 4. In the Section field, enter a section number for the section you are creating.

Step 5. Define section characteristics.

See "Defining Section Characteristics" beginning on page 113.

To create a section by accessing the Sections (SECT) form:

Step 1. Access the Section (SECT) form.

Step 2. At the Course Section LookUp prompt, enter the name of the course for which you want to create a section.

Step 3. Select the “Add” option to create a section.

Step 4. In the Section field, enter a section number for the section you are creating.

Step 5. Define section characteristics.

See “Defining Section Characteristics” beginning on page 113.

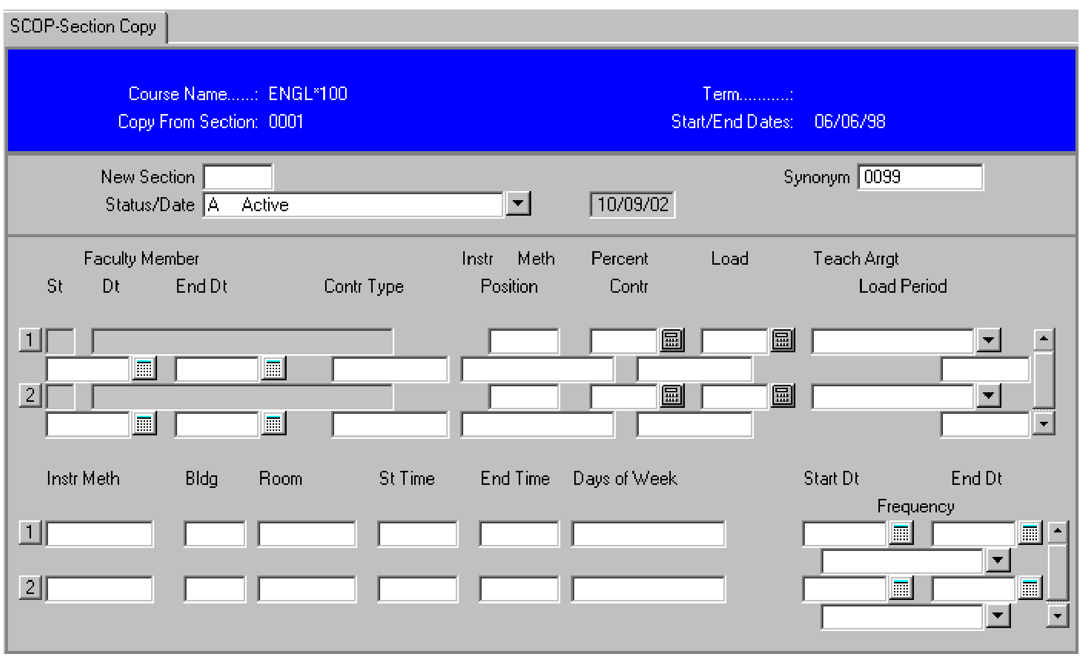
Copying an Individual Section

Understanding Copying an Individual Section

You can create a section by copying the information from another section. When you copy a section, the new section is an exact copy of the copied section, including instructor assignment, restrictions, billing information, requisites, and financial information.

Use the Section Copy (SCOP) form to copy a section. You can access the SCOP form from the menu or by detailing from the Section Summary (SSUM) form. From the SCOP form, you can override some of the information that defaults from the original section but is not applicable to the new section. To view and modify the new section record, you must access the new section on the Sections (SECT) form.

Figure 25: Section Copy (SCOP) Form



Procedure for Copying an Individual Section

Use the procedure below to copy an individual section.

Step 1. Access the Section Copy (SCOP) form.

Step 2. At the Course Section LookUp prompt, enter the section you want to copy.

You can enter the section name, record ID, or synonym (see "Section Names, IDs, and Synonyms" on page 100).

Step 3. In the New Section field, enter a section number for the section you are creating.

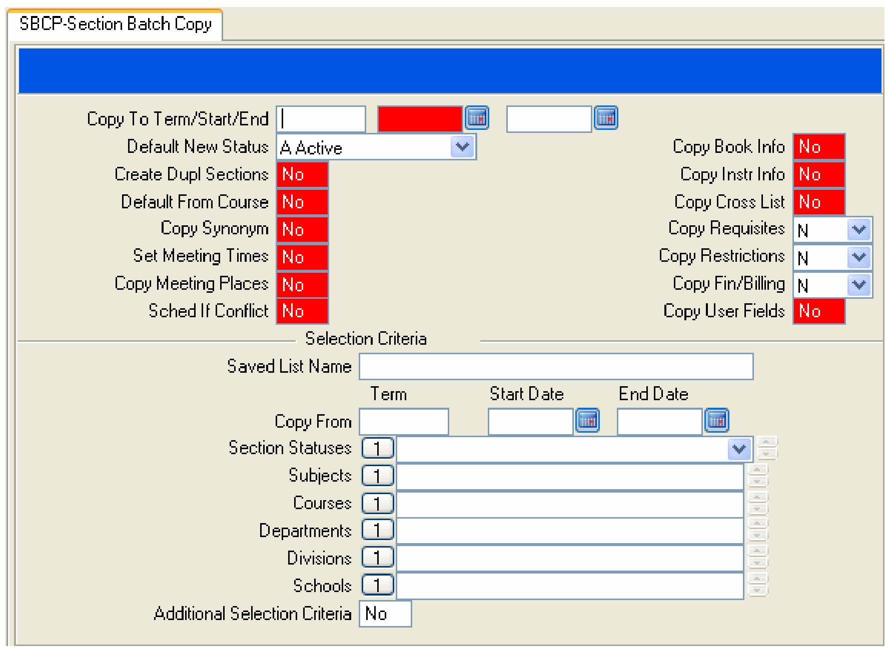
Step 4. Finish from the SCOP form.

Copying Sections in Batch

You can copy a group of sections at one time. You may want to replicate all course sections from one academic term into another academic term. For example, you may want to offer a similar catalog of course sections each fall.

Use the Section Batch Copy (SBCP) form, shown in Figure 26, to perform the batch copy.

Figure 26: Section Batch Copy (SBCP) Form



In the top part of the SBCP form, you can define some of the characteristics of the new sections and whether to copy certain characteristics. In the bottom part of the SBCP form, you can (optionally) limit the list of sections to be copied by specifying a saved list or other limiting criteria. See online help for the SBCP form for information about specific fields.

Defining Section Characteristics

You can define basic section characteristics on the Sections (SECT) form, and additional characteristics on other forms which you can reach by detailing from the SECT form. The table below lists the forms used to define section information, along with the place in this manual or another manual which provides procedures for completing that form.

Table 9: Forms Used to Define Section Characteristics

If you want to...	Use this form...	Accessible by detailing from this field on SECT...	Reference
Define basic section characteristics	Sections (SECT)	—	"Defining Basic Section Characteristics" on page 114
Make instructional assignments	Faculty Section Assignment (FASC)	Faculty Assignment	"Making Instructional Assignments" on page 133
Record offering information about a section	Section Offering Info (SOFF)	Offering Info	"Scheduling Sections" on page 125
Define section requisites	Section Requisites (SREQ)	Requisites	"Defining Section Requisites" on page 117
Define section restrictions	Section Restrictions (SRES)	Restrictions	"Defining Section Restrictions" on page 119
Define financial information for a section	Section Financial Info (SFIN)	Financial Info	"Defining Section Financial Information" on page 121
Define billing information for a section	Section Billing Information (SECB)	Billing Info	Accounts Receivable section of *Getting Started with Colleague Student*
Define registration date ranges	Section Reg Date Ranges (SRGD)	Reg Dt Ranges	"Setting Registration Date Ranges" on page 123
Cross-list two or more sections	Section Cross-List (SXRF)	Cross-Listings	"Cross-Listing Sections" on page 147
Define additional section information, used primarily for state reporting	Additional Section Information (ASCI)	Additional Info	"Defining Additional Section Information" on page 124

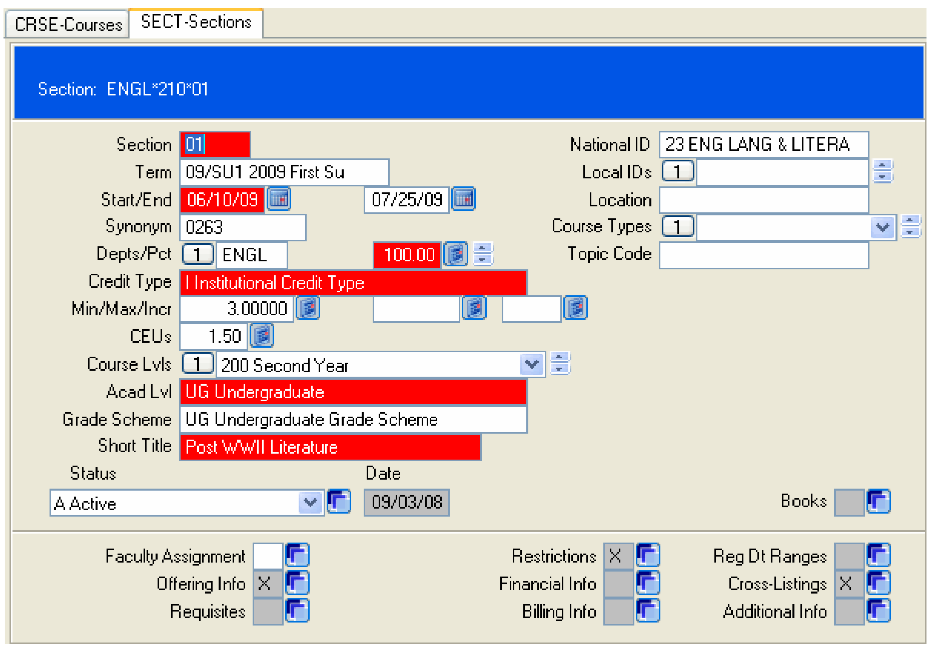
Before You Begin

Before you define characteristics for a section, you must create the section in Colleague. See “Creating Sections” beginning on page 103 for the procedure.

Defining Basic Section Characteristics

The main form for defining section characteristics is the Sections (SECT) form. Figure 27 shows the SECT form completed for an example section, ENGL*386*001.

Figure 27: Sections (SECT) Form



When you create a section from a course, most of the information defined for the course on the Courses (CRSE) form defaults into the corresponding fields on the SECT form. You can accept those defaults or change the information for the section. See “Defining Basic Course Characteristics” beginning on page 60 for the procedure for defining basic course characteristics.

Noteworthy Fields on the SECT form

The fields described in this section are particularly important when defining section characteristics. See online help for additional information about fields on this form.

- **Section.** When you create a course, you must enter a section number before finishing from the SECT form. If you offer two sections of a course in the same term, you should use different section numbers in order to prevent confusion. (If you try to enter a section number which already exists for that term, Colleague will display a warning message but will not prevent you from finishing from the form.)
- **Term** and **Start/End Dates.** When you create a section, the Term field is blank and the section Start Date is set to today’s date (if the course start date is before today) or to the course start date (if the course start date is in the future). If you enter a term in the Term field, section start and end dates default to the term start and end dates. You can override the defaults by entering dates in the Start/End date fields.
- **Synonym.** Your institution may have set up Colleague to automatically assign a synonym when you create a section. If so, you can accept the default synonym or override it by entering your own synonym (see “Section Names, IDs, and Synonyms” on page 100).
- **Location.** Location defaults from the course if the course is associated with one and only one location. If a course is associated with multiple locations, no location defaults to the section, and you must assign a location to the section before finishing from the SECT form. If a course is not associated with any locations, you can leave the Location field blank.
- **Books.** Allows you to detail to the Books (BOOK) form, where you can view, add, or remove books or similar course materials from an associated course or section.

How Course Characteristics Default Into Section Characteristics

When you create a course, you record course-specific information (such as offering information, requisites, restrictions, financial information, billing information, and location information) that defaults to the sections you create from the course. Except for prerequisites (discussed below) this information only defaults to the sections if you record it *before* you create sections. Any information you change on the course record *after* you create sections will not affect existing sections, with the exception noted below.

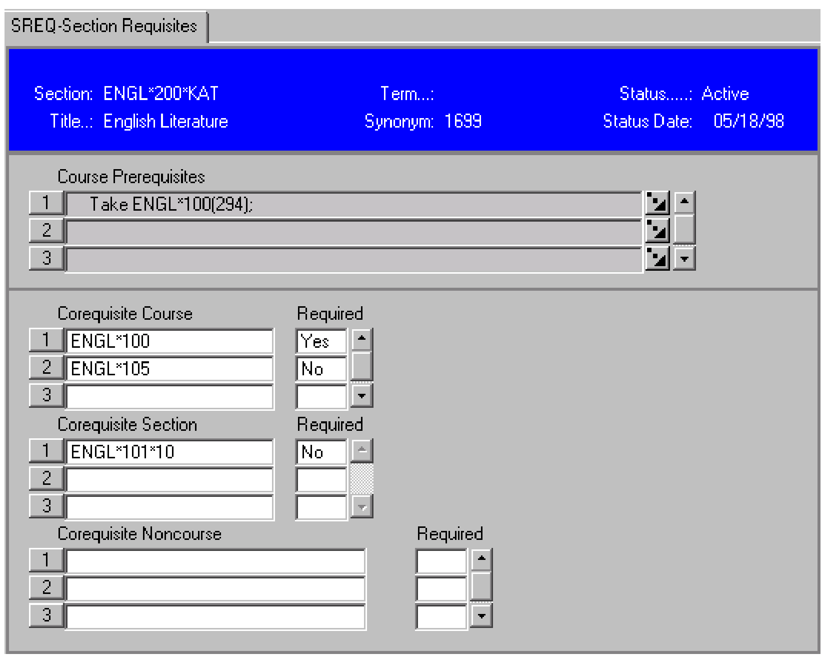
Prerequisites are the only exception to the rule. When you create a section from a course, and later change course prerequisites on the CREQ form, the section prerequisites automatically change to match the new course prerequisites. For an example, see Table 10 on page 118.

Defining Section Requisites

Sections, like courses, can have requisites which require that a student complete other work before taking the section (prerequisites) or at the same time (corequisites). Sections inherit three types of requisites from the course: prerequisite courses, corequisite courses, and corequisite noncourses. See "Understanding Course Requisites" on page 64 for definitions of each of these three types of requisites. In addition, sections can have corequisite sections, which are sections which a student should enroll in at the same time as this section.

Use the Section Requisites (SREQ) form, shown below, to define corequisites for a section. You can access the SREQ form from the menu, by detailing from the Requisites field on the Sections (SECT) form, or by detailing from the Section Summary (SSUM) form.

Figure 28: Section Requisites (SREQ) Form


SREQ-Section Requisites

Section: ENGL*200*KAT | Term...: | Status.....: Active
Title..: English Literature | Synonym: 1699 | Status Date: 05/18/98

Course Prerequisites
1 Take ENGL*100(294);
2
3

	Corequisite Course	Required
1	ENGL*100	Yes
2	ENGL*105	No
3		

	Corequisite Section	Required
1	ENGL*101*10	No
2		
3		

	Corequisite Noncourse	Required
1		
2		
3		

As with course corequisites, you can specify whether section corequisites are required or optional by entering **Yes** or **No** in the Required field. See "Understanding Course Requisites" beginning on page 64 for a discussion of how to make corequisites required and how to override requisites at registration.

How Course Requisites Default Into Section Requisites

As noted above, sections inherit prerequisite courses, corequisite courses, and corequisite noncourses from the course. You can change any of the inherited corequisites, but *not* the inherited prerequisites, on the SREQ form.

In general, if you change course characteristics after you have created sections from the course, sections already created do *not* change to match the new course characteristics. Prerequisites, however, are the exception to that rule. When you create a section from a course, and later change course prerequisites on the CREQ form, the section prerequisites automatically change to match the new course prerequisites. Section corequisites, however, do not change. Table 10 shows course and section requisites for an example workflow.

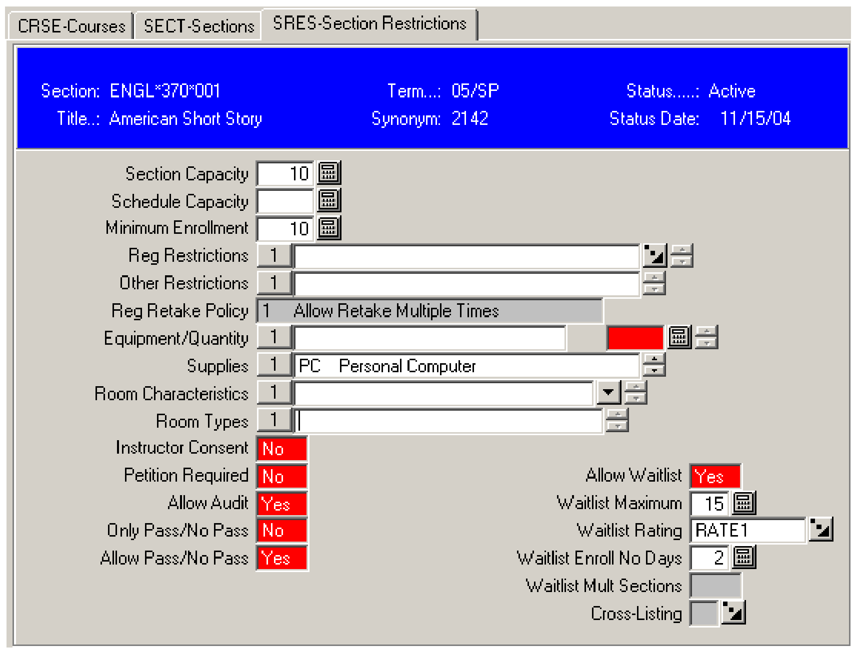
Table 10: How Section Requisites Change When Course Requisites are Changed

If you do this...	The course requisites look like this...	And the section requisites look like this...
Create a course with one prerequisite and one corequisite course.	Prerequisite: Math 101 Corequisite course: Engl 201	(Section not yet created)
Create a section from the course.	Prerequisite: Math 101 Corequisite course: Engl 201	Prerequisite: Math 101 Corequisite course: Engl 201
Change the course *prerequisite* on the CREQ form.	Prerequisite: Comp 101 Corequisite course: Engl 201	Prerequisite: Comp 101 Corequisite course: Engl 201
Change the course *corequisite* on the CREQ form.	Prerequisite: Comp 101 Corequisite course: Phys 201	Prerequisite: Comp 101 Corequisite course: Engl 201

Defining Section Restrictions

Section restrictions are registration and scheduling limitations on a section. Use the Section Restrictions (SRES) form to define restrictions for sections. You can access the SRES form from the menu, by detailing from the Restrictions field on the Sections (SECT) form, or by detailing from the Section Summary (SSUM) form.

Figure 29: Section Restrictions (SRES) Form



Many of the fields on the SRES form are the same as those on the Course Restrictions (CRES) form. When you create a section from a course, Colleague defaults the values from the course into the corresponding fields for the section. You can accept those defaults or override them by entering new values for the section. See "Definining Books and Course Materials" beginning on page 69 for the procedure for defining course restrictions.

Note: If you define course restrictions *before* you create sections from a course, the restrictions will default to the sections. If you define or change course restrictions *after* you create sections, the restriction information *will not* affect existing sections; it will, however, default to sections created after you implement the changes.

Noteworthy Fields on the SRES form

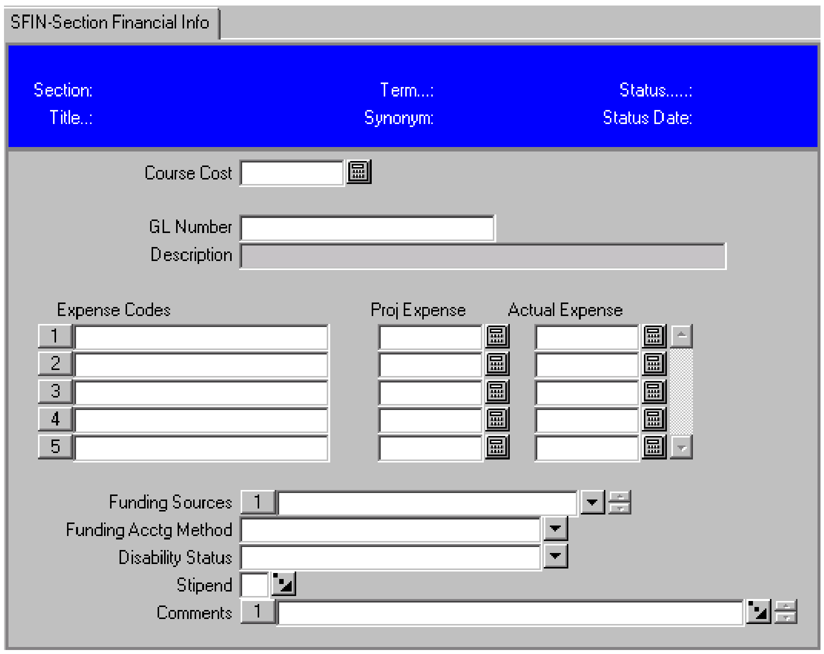
The fields described in this section are particularly important when defining restrictions for sections. See online help for additional information about fields on this form.

- **Section Capacity.** If you leave this field empty, Colleague will allow you to register an unlimited number of students for the section.
- **Allow Waitlist**, **Waitlist Maximum**, **Waitlist Rating, Waitlist Enroll No Days, and Waitlist Mult Sections.** For information about these fields, see "Defining Waitlist Criteria" beginning on page 165.

Defining Section Financial Information

You can use the Section Financial Info (SFIN) form, shown below, to record information about costs to your institution of offering a course. You can access the SFIN form from the menu, by detailing from the Financial Info field on the SECT form, or by detailing from the Section Summary (SSUM) form.

Figure 30: Section Financial Info (SFIN) Form



Many of the fields on the SFIN form are the same as those on the Course Financial Info (CFIN) form. When you create a section from a course, Colleague defaults the values from the course into the corresponding fields for the section. You can accept those defaults or override them by entering new values for the section. See "Defining Course Financial Information" beginning on page 77 for the procedure for defining course financial information.

Noteworthy Fields on the SFIN form

The fields described in this section are particularly important when recording information about costs to your institution of offering a course. See online help for additional information about fields on this form.

- **Funding Sources**, **Funding Acctg Method**, and **Disability Status.** These fields are used primarily for state reporting. If you are using Colleague to prepare state reports, see the Colleague documentation for your state. For example, if you are preparing state reports for California, see *Using California State Reporting*.

Defining Section Billing Information

Use the Section Billing Information (SECB) form to define billing information for the section. You can access the SECB form from the menu or from the Billing Info field on the Sections (SECT) form. See the Accounts Receivable section of *Getting Started with Colleague Student* for procedures for defining billing information on the SECB form.

Setting Registration Date Ranges

Your institution may offer different date ranges for students to register and deregister for sections. Registration dates are typically set up on the Academic Terms (ACTM) form by detailing from the Reporting Years and Terms (RYAT) form. The dates can then be overridden by location on the Term Location Dates (TLOC) form and by section on the Section Reg Date Ranges (SRGD) form. This hierarchy can be shown as:

ACTM < TLOC < SRGD

However, a registration user group can override these dates at the corresponding level. Registration processes look for dates in the following order, using whatever level is found first:

- **Registration user section dates.** Defined on the Reg User Section Dates (RGUC) form.
- **Section dates.** Defined on the Section Reg Date Ranges (SRGD) form.
- **Registration user term location dates.** Defined on the Reg User Term Location Dates (RGUL) form.
- **Term location dates.** Defined on the Term Locations Dates (TLOC) form.
- **Registration user term dates.** Defined on the Reg User Term Dates (RGUT) form.
- **Term dates.** Defined on the Academic Term (ACTM) form.

This hierarchy can be shown as:

ACTM < RGUT < TLOC < RGUL < SRGD < RGUC

Your institution may prefer to set up registration dates by registration user group. This allows your institution to have different registration dates available for a variety of registration user groups such as those who use Web registration, telephone registration, or staff members who register students on campus. For further information on registration date ranges, see *Getting Started with Colleague Student*.

Defining Section Registration Dates

You define section registration dates on the Section Reg Date Ranges (SRGD) form. Registration dates include start and end dates for preregistration, registration, course add, and course drop; as well as the date after which the student cannot drop a course without receiving a grade (specified in the Drop Grades Reqd field on the SRGD form). You can access the SRGD form from the menu, by detailing from the Sections (SECT) form, or by detailing from the Section Summary (SSUM) form.

Defining Section Sponsorships

Use the Sponsored Course Sections (SPSC) form to define billing information for each course section covered by a particular sponsorship agreement. For procedures for defining sponsorships, see *Using Accounts Receivable and Cash Receipts*.

Defining Additional Section Information

From the Additional Info field on the SECT form, you can detail to either of two forms:

- The Additional Section Information (ASCI) form allows you to record section information for state reporting. If you recorded course information on the Additional Course Information (ACOI) form, Colleague will default that information into the fields on the ASCI form when you create the section. (See "Defining Additional Course Information" beginning on page 78.) If you are using Colleague to prepare state reports, see the Colleague documentation for your state. For example, if you are preparing state reports for California, see *Using California State Reporting* for procedures for using the ASCI form.
- The Schedule 25 Section Info (S2SC) form allows you to record section information for use with Schedule 25, a third-party application which some institutions use for batch room scheduling.

Scheduling Sections

Before You Begin

Before you schedule a section you should:

Table 11: Information Needed Before You Assign an Instructor to a Section

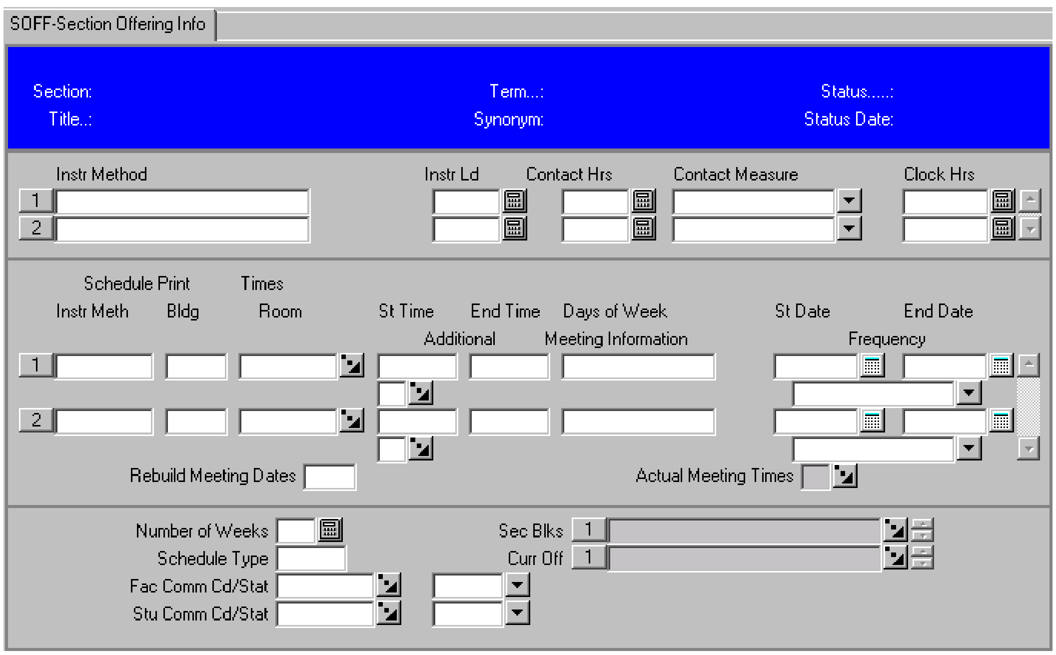
Action	Reference
Create the section	"Creating Sections" on page 103
Set up the buildings codes	Getting Started with Colleague Student
Set up the days of the week codes	Getting Started with Colleague Student
Set up the instructional methods codes	Getting Started with Colleague Student
Set up the teaching arrangements codes	Getting Started with Colleague Student

Understanding Section Scheduling

After you create a section, you should schedule when and where the section will meet. If the section has multiple instructional methods, you must schedule times and rooms for each method. For example, if a section has both lecture and lab as instructional methods, you must define times and a room for the lecture, and times and a room for the lab. This gives you the flexibility of allowing meetings in different locations at different times for different methods.

Use the Section Offering Info (SOFF) form to view and maintain scheduling information for a section.

Figure 31: Section Offering Info (SOFF) Form



You can access the SOFF form in any of the following ways:

- From the menu
- By detailing from the Offering Info field on the Sections (SECT) form
- By detailing from the Section Meeting field on the Faculty Section Assignment (FASC) form
- By detailing from the Section Summary (SSUM) form

Scheduling the section is a three-step process:

1. Define the meeting places (building/room), times, and days of the week for each instructional method. For the procedure, see “Assigning Places and Times to Sections” on page 128.
2. Let Colleague build the schedule for the section. Colleague creates a record for each day/time that the section will meet. For the procedure, see “Building Section Meeting Dates” on page 129.
3. Adjust the schedule, if necessary, by making changes to the schedule for particular days. For example, if a section was scheduled to meet every Monday in the fall term, but was unable to meet on a particular Monday, you could modify that schedule to make that Monday an exemption to the regular schedule. You would do this by deleting the record for that date. For the procedure, see “Adjusting the Actual Meeting Times” on page 131.

Assigning Places and Times to Sections

From the Schedule Print Times field on the SOFF form, you can assign buildings/rooms, meeting times, and days of the week to each instructional method for a section. This information is printed on student schedules and section schedules.

Note: You can identify a course section as "To Be Announced" if you don't have all of the scheduling information or it is too early in the cycle to know all of the locations and times. If you leave the Schedule Print Times field blank, Colleague automatically prints "TBA" on appropriate registration statements, student schedules and course section schedules.

Assigning Rooms and Buildings

For each instructional method defined, you should schedule the building and room where a section will meet. After you enter the name of a building, you must enter the name of a room in that building. Colleague compares the size of the classroom against the maximum capacity of the section and issues a warning if you select a room that is too small for your course section.

You can detail to the Rooms (RMSM) form for more information about a particular room.

Assigning Meeting Times and Days of the Week

You should schedule section meeting times and days of the week for each instructional method defined. You can enter the following information to schedule the course section:

- Start and end time
- Days of the week
- Start and end date
- Meeting frequency

Colleague uses the dates and times you enter to build the schedule of meeting dates for this section.

Building Section Meeting Dates

After you have defined the rooms and meeting times, you should build (or rebuild) the meeting dates. Colleague creates schedule records for each date and time period and associates each period with a room. This reserves the room in the schedule for that time period. Colleague checks these schedule records whenever conflict checking is required.

For example, Datatel University scheduled a section of the Math 101 course to meet in Brown Hall, room 220, every Thursday from September 9 through December 23. When the meeting dates were rebuilt, Colleague created a separate record for every Thursday morning (9-10:00 am), scheduling room 220 in Brown Hall. The first record was for the first Thursday on or after September 9, and the last record was for the last Thursday on or before December 23.

You should rebuild the schedule each time you make any change to the section so that all time conflicts are identified. If you do not rebuild the schedule, Colleague does not reserve the room for all of the times and dates in the range. You may, however, choose not to rebuild if you have already made changes in the schedule in the Actual Meeting Times group or if you want the change to be reflected in the printed schedule only.

You can rebuild the meeting dates for each individual course section as you define the dates and times, or you can rebuild the meeting dates for a batch of course sections. The following sections describe each method.

Building Meeting Dates For An Individual Section

If you want to rebuild the schedule for the course section, enter **`Yes`** in the Rebuild Meeting Dates field on the Section Offering Info (SOFF) form. As soon as you leave the Rebuild Meeting Dates field, Colleague builds the meeting date records based on entries in the Schedule Print Times field.

If you do not want to rebuild the schedule as you make changes to the times and meeting places of a course section, enter **`No`** in the Rebuild Meeting Dates field, or skip the field (the default is **`No`**).

Rebuilding Meeting Dates For A Batch of Sections

To rebuild the schedule records for a group of course sections, finish from the SOFF form and access the Rebuild Section Meeting Dates (RSMD) form.

Select the criteria that describe which course section you want to process. You can enter the name of a saved list with records form the COURSE.SECTIONS file. See the online help for the RSMD form for more information about specific fields.

Adjusting the Actual Meeting Times

After you have built the schedule records for the course section, you may want to adjust some of the actual meeting dates. For example, if a course section was scheduled to meet every Thursday in the fall term, you may want to modify that schedule to make the Thanksgiving Thursday an exemption to that regular schedule.

To review or adjust the actual meeting times, detail to the Section Schedule Detail (SESC) form from the Actual Meeting Times field on the Section Offering Info (SOFF) form. On the SESC form you can delete particular records that do not actually apply to this section. You can also add new schedule records for the section.

Procedure for Scheduling a Section

Complete the following steps to schedule a course section:

Step 1. Familiarize yourself with the procedure for scheduling a course section.

See “Understanding Section Scheduling” on page 126.

Step 2. Access the course section record on the Section Offering Info (SOFF) form.

Step 3. Go to the Schedule Print Times group and enter the following information for the section:

- Building
- Room
- Start and End Times
- Days of the Week
- Start and End Dates
- Meeting Frequency

Colleague prints this information on student and facility schedules.

Colleague uses this information to build the schedule records that are used during all schedule checking.

For more information, see “Assigning Places and Times to Sections” on page 128

Step 4. If you want to create schedule records for this section, go to the Rebuild Meeting Dates field and enter **`Yes`**.

If you do not create schedule records for the individual section, remember to launch the Rebuild Section Meeting Dates (RSMD) process. For more information about RSMD, see “Rebuilding Meeting Dates For A Batch of Sections” on page 130.

If you want to change only the printed schedules, enter **`No`** in the Rebuild Meeting Dates field.

For more information, see “Building Section Meeting Dates” on page 129.

Step 5. If you want to adjust the actual meeting times, detail to the Section Schedule Detail (SESC) form from the Actual Meeting Times field.

Otherwise, go to Step 7.

Colleague displays the Section Schedule Detail (SESC) form.

For more information, see “Adjusting the Actual Meeting Times” on page 131.

Step 6. Change the individual records to match actual meeting times for this course section.

Step 7. Save the record.

Making Instructional Assignments

Before You Begin

Before you assign an instructor to a section you must:

Table 12: Information Needed Before Making Instructional Assignments

Action	Reference
Create the section	"Creating Sections" beginning on page 103
Set up instructional methods codes	Getting Started with Colleague Student
Set up teaching arrangements codes	
Enter all faculty member qualification information[a]	Using Faculty Information

a. optional

Understanding Faculty Instructional Assignments

After you create a course section, you will want to assign at least one instructor to it. You do not have to do this when you first create the section and students can enroll in sections before this assignment is made. You should complete the faculty assignment before the class start date.

Your institution may set a limit on the faculty member's activities by defining the maximum workload for each faculty member. Likewise, the faculty member's contract may dictate a workload maximum. If your institution uses the HR Human Resources module, the maximum workload is defined in a faculty member's contract using the Human Resources module. See *Using Human Resources* for more information about the HR interface with the Student System. If you do not use the Human Resources module, see *Using Faculty Information* for more information about defining faculty workload.

Interface with the Human Resources Module

If your institution uses Datatel's Human Resources module, instructional assignments can be associated with both existing HR contracts and new part-time HR contracts.You can not create new full-time contracts from the Student System application. You must refer to the Human Resources application to create new full-time contracts.

For example, you can add instructional assignments for a returning faculty member, if this person has a valid contract with your institution. The course sections you assign to his schedule are automatically recorded with his contract information in the Human Resources module. If his contract defines a maximum workload, Colleague calculates his workload and notifies you if the present assignment produces an overload for this faculty member. You can override the overload notice, but you should note the overload condition and make any adjustments necessary in the HR application. See "…With an Existing HR Contract" on page 141 for the steps for making an instructional assignment to an existing HR contract.

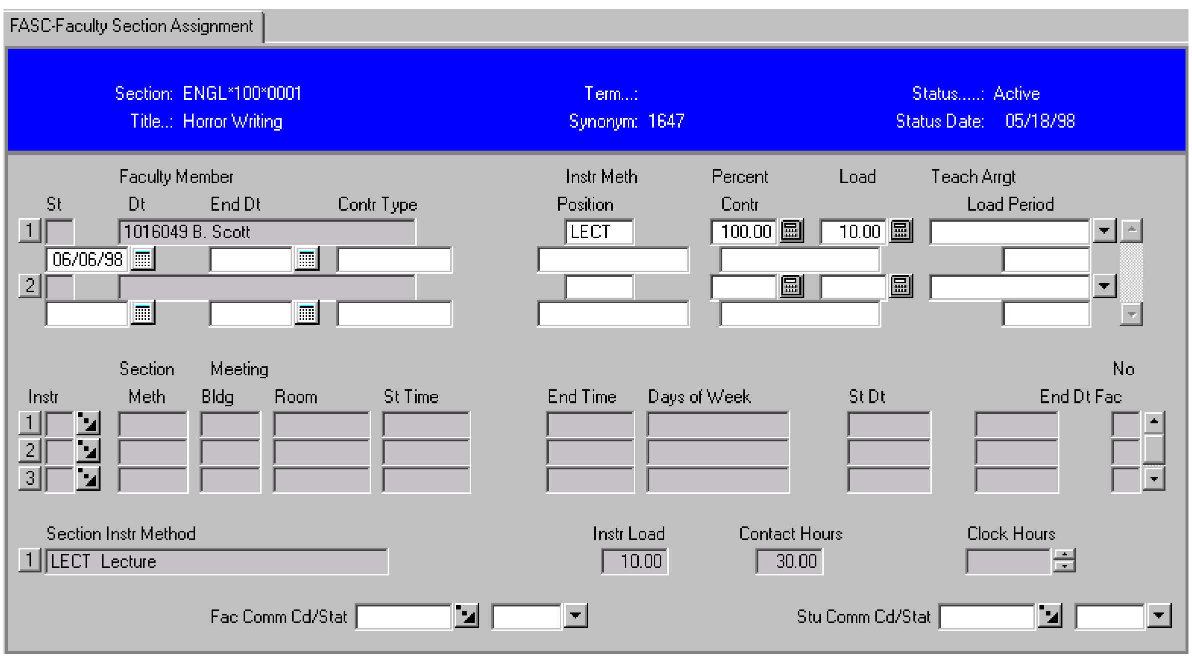
You can also create a new part-time contract. For example, a department Dean may want to hire an adjunct professor to fill a teaching vacancy for the next academic term. The Dean can enter the new hire into Colleague and make an instructional assignment. Colleague creates a new contract and transfers this information to the HR application. See "…With a New Part-time Contract" on page 144 for the steps for making an instructional assignment to a new part-time HR contract.

Note: Your HR office must still process these records before the adjunct professor will be paid.

Making a Faculty Instructional Assignment

Use the Faculty Section Assignment (FASC) form, shown in Figure 32, to assign instructors to course sections. You can access the FASC form from the menu level or by detailing from the Faculty Assignment field on the Sections (SECT) form in the Curriculum Management (CU) module.

Figure 32: Faculty Section Assignment (FASC) Form



To assign an instructor, enter a faculty name or ID in the Faculty Member field on the Faculty Section Assignment (FASC) form.

You can also use the FASC form to access information about a course section’s meeting schedule. You can detail to the Section Offering Info (SOFF) form from the Section Meeting field on the FASC form to maintain meeting information. See “Scheduling Sections” beginning on page 125 for more information about setting section meeting times.

Optional Faculty Qualification Information

If you have defined faculty qualifications (on the Faculty Qualifications [FQAL] form), you can assign a faculty member only to a section that meets the criteria defined by the qualifications for that faculty member.

To generate a list of faculty members qualified to teach a course, run the faculty qualifications cross-reference batch process (on the Qualified Faculty Cross-Ref [QFXR] form) prior to section assignment. Then, when you are entering faculty for a course section, you can enter “Q” for Qualified at the Faculty LookUp or <Q> for qualified: prompt, to access the Cross-referenced faculty qualifications information on the course.

See *Using Faculty Information* for more information about generating faculty qualifications cross-reference information.

Note: Your institution is not required to use the Faculty Qualifications tool. You do not have to define qualifications for your faculty members. If you choose not to use this tool, your faculty members are not restricted in course section assignment; you can assign any faculty member to any section.

Default Information

Colleague defaults information from the section record into the faculty assignment record, including the section’s

- Start/end dates
- Instructional method(s)
- Teaching arrangements
- Workload

You can override the defaults as necessary.

Defaults Affected by Optional Subroutines

Your institution can define subroutines which further affect the values defaulted into the FASC form. These subroutines affect:

- Workload calculations
- Contract position

Optional Workload Calculations

If your institution has defined subroutines for calculating the faculty workload for the instructional methods differently than from the defaults, the following fields could be affected:

- Load
- Percent
- Section credits

Note: If the subroutine calculation changes the section credits and students have already registered for this section, their student credits will NOT be affected. The change affects only future student enrollment.

These workload calculation subroutines are defined on the Faculty Information Defaults (FIDE) form for associated instructional methods. See *Getting Started with Colleague Student* for more information about defining these subroutines.

Contract Position

If you enter a contract type (only appropriate if you are using the HR application) and your institution has defined a contract position subroutine, the following field could be affected:

- Position

This contract position subroutine is defined on the Faculty Information Defaults (FIDE) form. See *Getting Started with Colleague Student* for more information about defining this subroutine.

Assigning Instructional Methods

When you access a course section on the FASC form for faculty assignment, the instructional methods default from the section record. If the section has multiple instructional methods, the first method listed on the section record defaults to the instructor assignment. You can override the default method and enter the method that applies. You can also delete or overwrite any instructional methods that default from the section record.

However, you cannot enter instructional methods that are not listed for the section in the section record.

See "Defining Course Offering Information" on page 63 for information about adding instructional methods to sections.

Multiple Instructional Methods

If multiple instructional methods are listed for the section, the first method defaults to the assignment. You may override the default method by selecting another method from the list.

Multiple Instructors

If you are assigning multiple instructors to a section, you may assign a separate instructional method to each instructor, or you may assign the instructional method to each instructor and enter the load percentage for each instructor. The sum of the percentages must equal 100 percent.

Example. If a section has both lecture and lab as instructional methods, you can assign a single instructor to the section and either select an instructional method from the list, or assign both methods to the instructor. If you want to assign multiple instructors to this section, you could do one of the following:

- Assign one to teach the lecture and the other to teach the lab
- Assign both to teach the lecture, splitting the load percentages as necessary, and assign one to the lab

Procedure for Making an Instructional Assignment…

This section provides procedures for creating a faculty instructional assignment:

- Independent of an HR contract
- With an existing HR contract
- With a new part-time contract

…Independent of an HR Contract

Complete the following steps to assign a faculty member to a course section. This procedure assumes you are not using the Human Resources application and the instruction assignment is independent of an HR contract.

Step 1. Familiarize yourself with the procedure for assigning a faculty member to a course section.

Read "Understanding Faculty Instructional Assignments" on page 134.

Step 2. Access the course section you want to assign faculty to using the Faculty Section Assignment (FASC) form.

You can access the FASC form from either the menu or by detailing from the Course Section (SECT) form.

Use standard LookUp procedures to locate the appropriate course section.

Step 3. Enter the name of the faculty member you want to assign to the course section at the Faculty LookUp or (Q) for Qualified prompt.

See *Using Faculty Information* for more information about defining and using faculty qualifications.

Colleague displays a warning message if no qualification records exist for the faculty member you enter. If this is of no concern to you, return through the message.

Step 4. Colleague defaults the following values from the course definition:

- Start/end dates
- Instructional method(s)
- Workload
- Contact hours

You can modify any of the defaulting values, if necessary.

See "Default Information" on page 136 for more information about the default.

If you want to add another instructor to this course section, repeat this procedure beginning with Step 3.

See "Multiple Instructors" on page 138 for more information about assigning multiple instructors to one course section.

Save this course section record.

…With an Existing HR Contract

Note: his procedure assumes that the faculty member already has an established contract known to the Human Resources application. This contract can be either full or part time. See *Using Human Resources* for more information about defining a faculty contract.

Complete the following steps to make an instructional assignment for a faculty member who has an existing contract with the Human Resources application:

Step 1. Familiarize yourself with the procedure for assigning a faculty member to a course section.

Read “Understanding Faculty Instructional Assignments” on page 134.

Step 2. Access the course section you want to assign faculty to using the Faculty Section Assignment (FASC) form.

You can access the FASC form from either the menu or by detailing from the Course Section (SECT) form.

Use standard LookUp procedures to locate the appropriate course section.

Step 3. Enter the name of the faculty member you want to assign to the course section at the Faculty LookUp or (Q) for Qualified prompt.

See *Using Faculty Information* for more information about defining and using faculty qualifications.

Colleague displays a warning message if no qualification records exist for the faculty member you enter. If this is of no concern to you, return through the message.

Colleague defaults the following values from the course definition:

- Start/end dates
- Instructional method(s)
- Workload
- Contact hours

You can modify any of the defaulting values, if necessary.

See “Default Information” on page 136 for more information about the defaults.

Step 4. Enter the contract type of the existing HR contract in the Contr Type field.

Colleague displays the load period in the Load Period field if it has been defined to mirror the academic term of the course section.

The cursor moves to the Position field.

This contract type must be an exact match. It can be either a full-time or a part-time contract.

Colleague defaults the load period which is like the academic term of the course section (if such a load period has been defined.)

If your institution has defined your load period in another way, Colleague does not default the load period. You must go to the Load Period field and enter an appropriate code.

If your institution has defined a subroutine to define contract positions (on FIDE), Colleague calculates and displays the faculty’s position in the Position field. See “Contract Position” on page 137 for more information.

Step 5. Enter the faculty member's contract position for this assignment.

The cursor moves to the Contr field.

The position you enter *must* have a payment type that matches the payment type of the contract type for this assignment. For example, if the contract type has an hourly payment type, then so must the position.

If you choose a new position, a new position is created in the HR contract. A faculty member can have multiple positions on one contract.

Step 6. You do NOT need to enter anything in the Contr field.

You *can* enter "..." in the Contr field and Colleague displays the contract ID, but you do not have to do this.

Later when you update the record, the contract ID is displayed for your confirmation.

Step 7. If you want to add another instructor to this course section, repeat this procedure beginning with Step 3.

See "Multiple Instructors" on page 138 for more information about assigning multiple instructors to one course section.

If the additional faculty member does not have an existing HR contract and you wish to create one, refer to "…With a New Part-time Contract" on page 144.

Step 8. Update the record.

The contract ID is displayed for your confirmation.

If you want to change any of the contract information, go to the appropriate field.

The contract ID is later updated to the contract number if there is one defined.

Step 9. Save the course section record.

…With a New Part-time Contract

Note: You can only create a new part-time contract using the Student System application. If you want to create a full time contract, you must refer to the Human Resources application. See *Using Human Resources* for more information about defining a faculty contract.

Note: This procedure does not allow the new faculty member to be paid. Your HR office must still process the appropriate records. See *Using Human Resources* for more information about processing new employees.

Complete the following steps to make an instructional assignment for a faculty member for whom you also want to create a new part-time contract.

Step 1. Familiarize yourself with the procedure for assigning a faculty member to a course section.

Read "Understanding Faculty Instructional Assignments" on page 134.

Step 2. Add a new faculty member to the database using the Faculty (FCTY) form.

See *Using Faculty Information* for more information about entering a new faculty member.

Step 3. Access the course section you want to assign faculty to using the Faculty Section Assignment (FASC) form.

You can access the FASC form from either the menu or by detailing from the Course Section (SECT) form.

Use standard LookUp procedures to locate the appropriate course section.

Step 4. Enter the name of the faculty member you want to assign to the course section at the Faculty LookUp or (Q) for Qualified prompt.

See *Using Faculty Information* for more information.

Colleague displays a warning message if no qualification records exist for the faculty member you enter. If this is of no concern to you, return through the message.

Colleague defaults the following values from the course definition:

- Start/end dates
- Instructional method(s)
- Workload
- Contact hours

You can modify any of the defaulting values, if necessary.

See “Default Information” on page 136 for more information about the defaults.

Step 5. Enter the appropriate contract type for a part-time HR contract in the Contr Type field.

This contract type must be for a part-time contract. Contact your HR office for the appropriate codes to use.

Colleague displays the load period Load Period field if it has been defined to mirror the academic term of the course section.

The cursor moves to the Position field.

Colleague defaults the load period which is like the academic period of the course section (if such a load period has been defined.)

If your institution has defined your load period in another way, Colleague does not default the load period. You must go to the Load Period field and enter an appropriate code.

If your institution has defined a subroutine to define contract positions (on FIDE), Colleague calculates and displays the faculty’s position in the Position field. See “Contract Position” on page 137 for more information

Step 6. Enter the contract position for this assignment.

The cursor moves to the Contr field.

The position you enter must have a payment type that matches the payment type of the contract type for this assignment. For example, if the contract type has an hourly payment type, then so must the position.

Step 7. You do NOT need to enter anything in the Contr field.

When you update the record, the contract ID is displayed for your confirmation.

You *can* enter "..." in the Contr field and Colleague displays the contract ID, but you do not have to do this.

Step 8. Save the course section record.

Colleague transfers the information about this new contract and the associated instructional assignment to the HR application. New records are created in the following HR files:

- PER.ASGMT.CONTRACT
- PAC.LOAD.PERIODS
- PAC.LP.POSITIONS
- PAC.LP.ASGMTS

Working With Sections

Cross-Listing Sections

Before You Begin

Before you cross-list sections you should set up each section you want to cross-list. See "Creating Sections" beginning on page 103 for information about setting up sections.

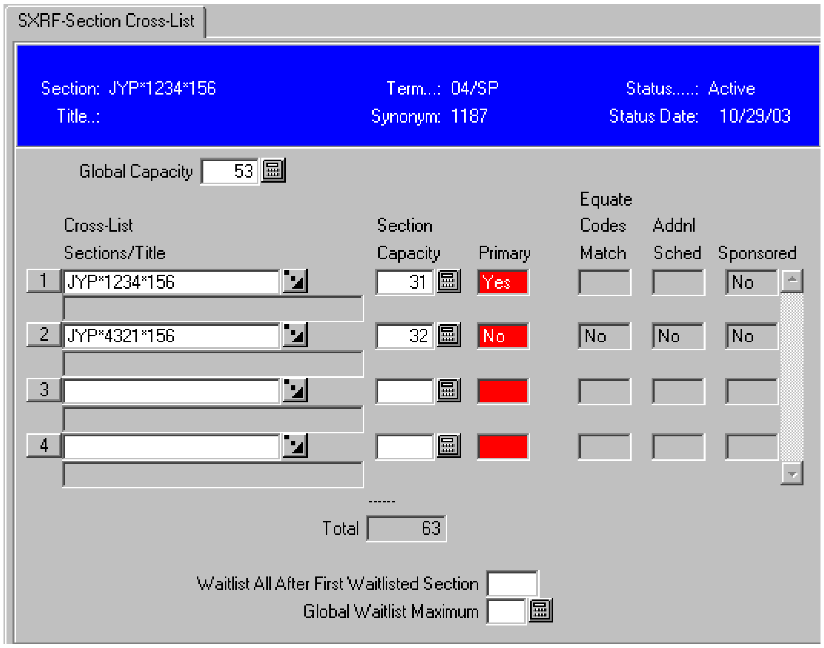
Understanding Section Cross-Listing

Cross-listed sections are two separate sections that meet at the same time, in the same place, and may be taught by the same instructor. Cross-listing allows Colleague to keep count of empty seats for the section synchronized with the seating limits of the classroom.

Cross-listing sections should not be confused with equating courses. Equating courses allows two courses to be considered equivalent in the registration process and the academic program evaluation process. Cross-listed sections are taught by the same instructor at the same time, so the content for each section is usually identical. Therefore, it is common to set both courses up with the same equate codes and thus make all their sections interchangeable for meeting academic requirements. However, Colleague does not force you to equate the two courses in order to cross-list the sections. See "Equating Courses" beginning on page 87 for more information about equate codes and assigning them to courses.

Use the Section Cross-List (SXRF) form to cross-list sections. You can access the SXRF form from the menu, by detailing from the Sections (SECT) form, or by detailing from the Section Summary (SSUM) form.

Figure 33: SXRF form accessed from the Sections (SECT) Form



Interface with Registration

You can limit the number of students eligible to register for all the sections in the cross-list by entering the maximum in the Global Capacity field. During registration, Colleague checks the number in this field to determine if a student may register for any of these sections. For information on the fields used for waitlisting, see “Defining Waitlist Criteria” beginning on page 165.

Procedure for Cross-Listing Sections

Use the Section Cross-List (SXRF) form to set up cross-listed sections. Refer to “Understanding Section Cross-Listing” on page 147 and on-line help for more information about the fields on the SXRF form.

Changing Section Statuses

Before You Begin

Before you change a section’s status you should:

Table 13: Information Needed Before You Change a Section’s Status

Action	Reference
Set up the section status codes including a status “Freeze for Cancellation.”	See *Getting Started with Colleague Student* for more information about defining these codes.
Set up the communication codes	

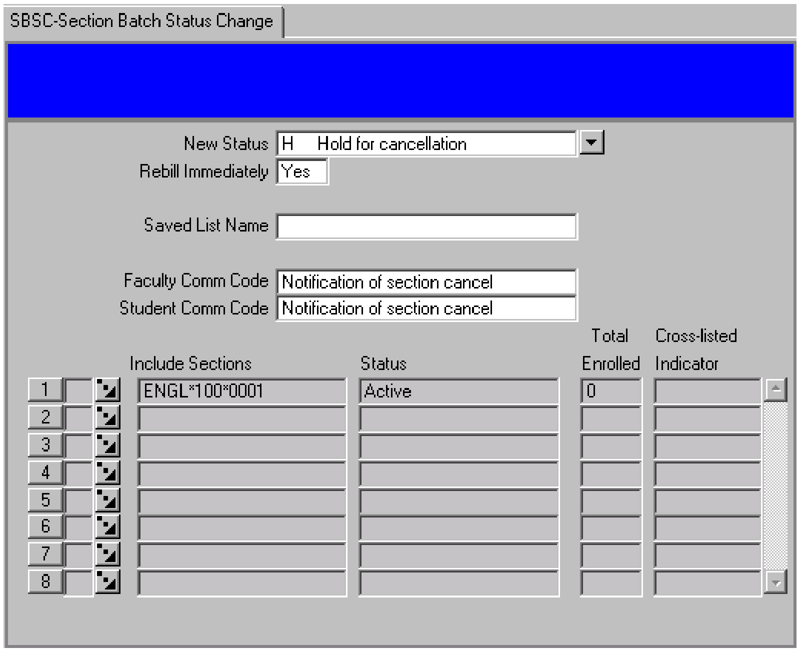
Understanding Section Batch Status Changes

You can change the status of a single section or a group of sections using the Section Batch Status Change (SBSC) form. You can cancel a section by changing its status.

The Curriculum Management module is linked with the Communications Management module. You can notify both the instructors and students of the section’s status change, including cancellation, by entering the communications codes in the Faculty Comm Code field and the Student Comm Code field. For more information about the Communications Management module, see *Using Communications Management*.

Before you change the statuses of a group of sections, you can create a saved list of the sections and use the saved list on the SBSC form. If you want to change the status of a small group, you may enter each section in the Include Sections group

Figure 34: Section Batch Status Change (SBSC) Form



Selection Criteria

Whether or not you use a saved list, you can enter selection criteria at the Sections LookUp prompt to further identify the sections you want to use.

Cancelling a Section

ALERT! When you cancel a section, several irreversible actions take place. The students registered for the section will be unregistered and the room reserved for the section will be released and free to other reservations.

In addition, if the section is the primary listing of cross-listed sections, *all secondary sections in the cross-list will also be canceled*. If you only want to cancel the primary section and not the secondary section, you should first change the section to secondary and identify another section as the primary section.

Suggested Workflow. Because of the other areas affected by section cancellation, Datatel recommends that you create a section status code equivalent to “Freeze for Cancellation” before you begin the cancellation process. Use this code to signify that the sections with this status will be cancelled after a waiting period defined by your institution. During this waiting period, you will be able to retrieve sections which are not going to be cancelled and change their statuses. Students will no longer be able to register for these sections until you return their statuses to active. See *Getting Started with Colleague Student* for information about defining codes.

Note: Do not *delete* the inactive course section record, since there still may be some academic requirements that reference it and since there probably are students who reference the course section in their academic records.

Procedure for Changing Statuses of a Section

Use the Section Batch Status Change (SBSC) form to change the status for an individual section or a group of sections. Use your institution’s section status code equivalent to “Freeze for Cancellation.” Refer to “Understanding Section Batch Status Changes” on page 149 and online help for information about the SBSC form.

Note: If you cancel the primary section of cross-listed sections, all secondary sections will be cancelled. If you want to cancel the primary section but not the secondary sections, identify another section as the primary section and the targeted section as a secondary section. For more information about cross-listing sections, see “Cross-Listing Sections” beginning on page 147.

Grouping Sections for Registration

You may want the students in some of your academic programs to take a set of related sections. In Colleague, you can group such sections in section blocks, so that you can easily register the students for all of the sections in the block. From the Sections menu in Colleague, you can access four forms related to grouping sections for registration:

- The Section Block (SCBL) form allows you to define a section block.
- The Section Block View (SCBV) form allows you to view a list of students registered for a section block.
- The Curriculum Offering (CUOF) form allows you to define a curriculum offering, which is a sequence of section blocks.
- The Curriculum Offering View (COFV) form allows you to view a list of students assigned to a particular curriculum offering.

For the procedures for defining section blocks and curriculum offerings, see *Using Block Registration*.

Viewing and Reporting Section Information

Table 14 lists the types of information available, the Colleague forms you use to view or report the information, and where you can find procedural information.

Table 14: Procedures for Viewing and Reporting Section Information

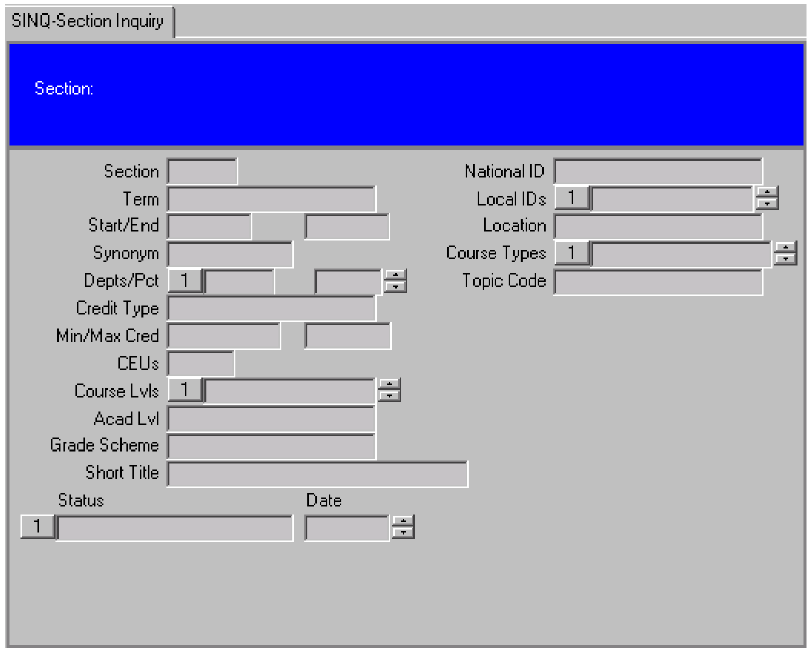
To view or report this information...	Use this form...	Reference
Basic information		
View basic information about a section.	Section Inquiry (SINQ)	“Viewing Basic Section Characteristics” on page 154
Enrollment Information		
View a list of students registered for a section.	Section Roster Inquiry (SRSI)	“Viewing a List of Students Registered for a Section” on page 155
View or print a section roster.	Section Roster (SROS) or Section Prerequisite Roster (SPRT)	“Generating Section Rosters” on page 157
View or print a report showing enrollment availability for a section.	Section Availability Report (CSAR)	“Generating Section Availability Reports” on page 158
Scheduling information		
View meeting information for a section.	Section Meeting Inquiry (SMIN)	“Viewing Section Meeting Informations” on page 159
View or print a schedule of sections.	Course Section Schedule (CSSC)	“Generating Section Schedules” on page 160

Some users at your institution may not have the authority to access the maintenance forms, like the Sections (SECT) form, which are used to modify section information. The section inquiry forms (SINQ, SRSI, and SMIN) allow those users to view section information.

Viewing Basic Section Characteristics

Use the Section Inquiry (SINQ) form, shown below, to view basic characteristics of a section.

Figure 35: Section Inquiry (SINQ) Form



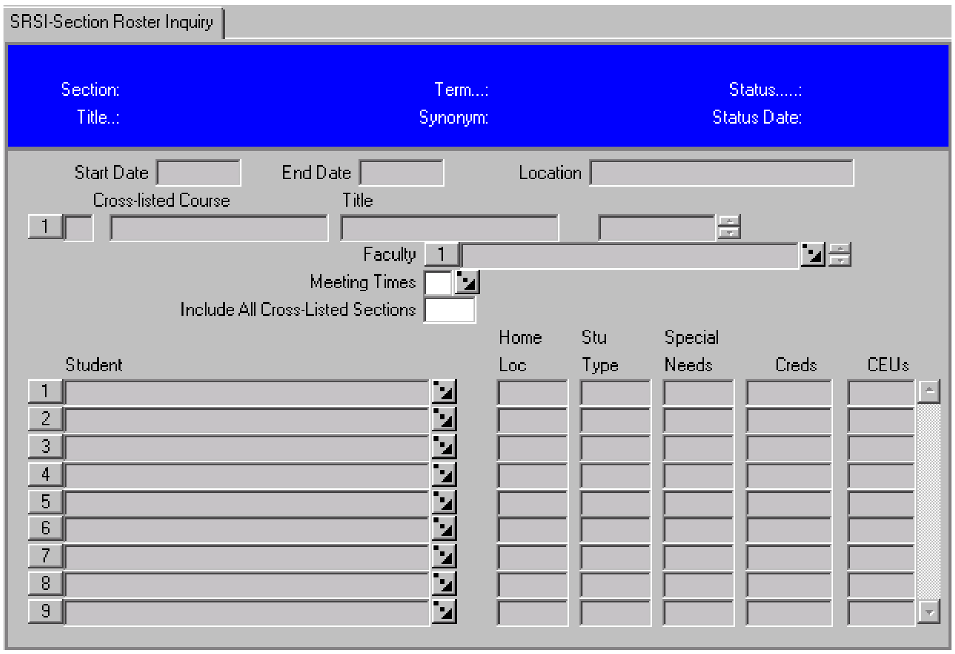
The information on the SINQ form is the same as that on the Sections (SECT) form. The difference is that section information can be changed from the SECT form but not from the SINQ form. The SINQ form makes section information available to users at your institution who do not have authority to access the SECT form.

You can access the SINQ form from the menu or by detailing from the Sections/Title field on the Section Cross-List (SXRF) form.

Viewing a List of Students Registered for a Section

Use the Section Roster Inquiry (SRSI) form, shown below, to view a list of students registered for a section.

Figure 36: Section Roster Inquiry (SRSI) Form



On the SRSI form, you can also view sections which are cross-listed to this section, and you can detail to the following forms to view other section information:

Table 15: Detail Forms from the SRSI Form

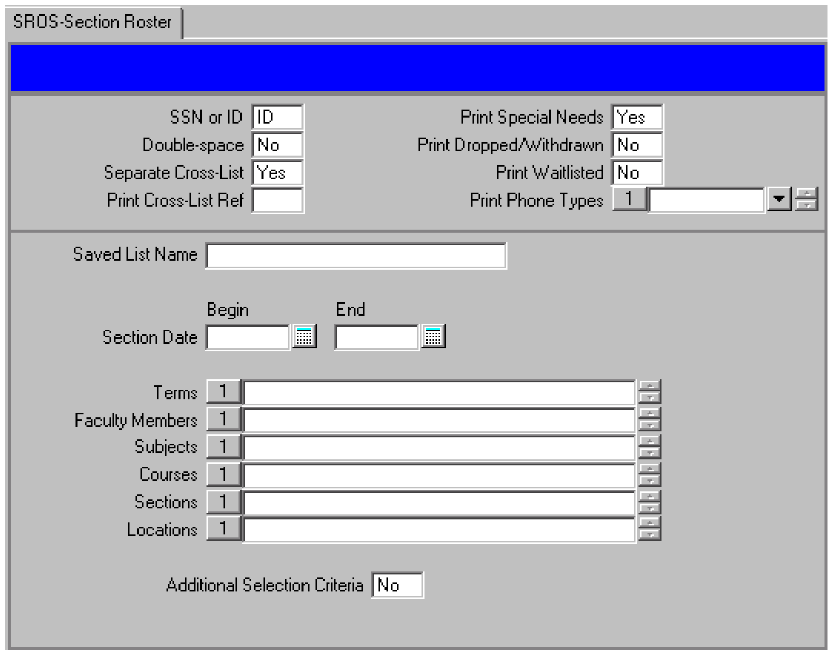
Detail from this field on the SRSI form...	To this form...	To view information about...
Faculty	Faculty (FCTY)	Instructors assigned to the section
Meeting Times	Section Meeting Summary (CSMS)	Meeting places and times for the section, for each instructional method
Student	Student Profile (SPRO)	Information about each student enrolled in the section

You can access the SRSI form from the menu or from the Total Enrollment field on the Section Meeting Inquiry (SMIN) field.

Generating Section Rosters

You can use the Section Roster (SROS) form or Section Prerequisite Roster (SPRT) form to view or print a section roster. The SROS form is shown below. The SPRT form has the same fields.

Figure 37: Section Roster (SROS) Form



The difference between these two forms is the information included in the report. The report generated from the SROS form includes four pieces of information, for each student, which are not included in the report generated from the SPRT form:

- Acad Level Taken
- Acad Program
- Admit Status
- Anticipated Completion Date

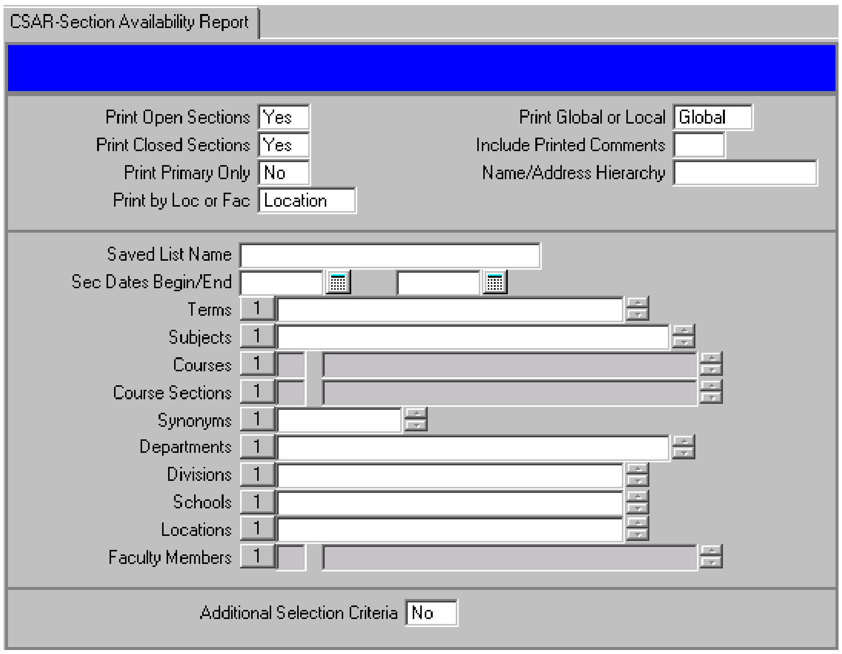
The report generated from the SPRT form includes, for each student, an indication of the student's progress with respect to course prerequisites. This information is not included in the report generated from the SROS form.

From either the SROS or SPRT form, you can specify a saved list of records from the COURSE.SECTIONS file to limit the sections included in the roster.

Generating Section Availability Reports

Use the Section Availability Report (CSAR) form to generate a report indicating whether course sections are available.

Figure 38: Section Availability Report (CSAR) Form


CSAR-Section Availability Report

Print Open Sections Yes
Print Closed Sections Yes
Print Primary Only No
Print by Loc or Fac Location
Print Global or Local Global
Include Printed Comments
Name/Address Hierarchy

Saved List Name
Sec Dates Begin/End
Terms 1
Subjects 1
Courses 1
Course Sections 1
Synonyms 1
Departments 1
Divisions 1
Schools 1
Locations 1
Faculty Members 1

Additional Selection Criteria No

This report gives you section availability information including the following:

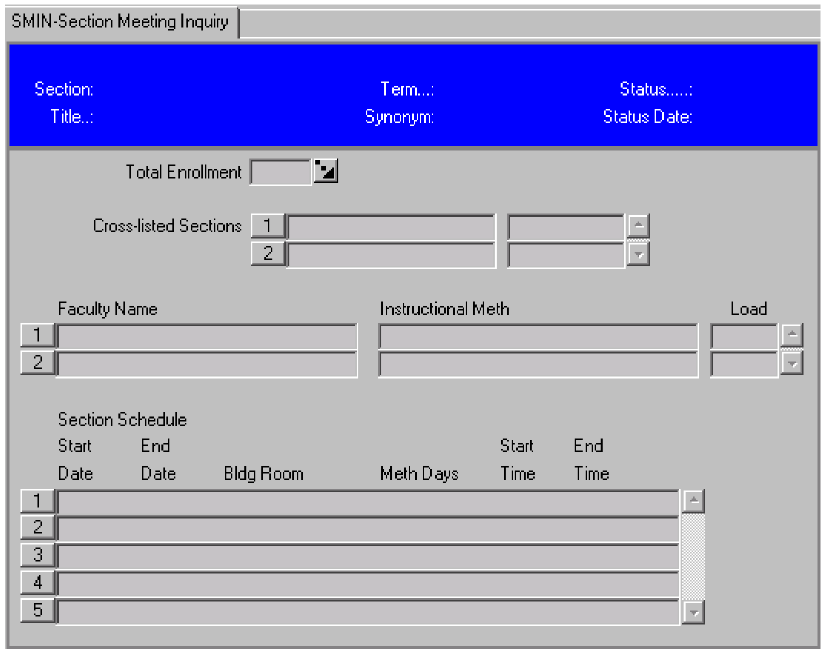
- **Room Cap.** Room capacity
- **Sect Min.** Section minimum enrollment
- **Sect Cap.** Section capacity
- **Used.** Number of used (filled) slots
- **Wait.** Number of waitlisted students
- **Avail.** Number of slots still available

In the Saved List Name field, you can specify a saved list of records from the COURSE.SECTIONS file.

Viewing Section Meeting Informations

Use the Section Meeting Inquiry (SMIN) form to view meeting information.

Figure 39: Section Meeting Inquiry (SMIN) Form

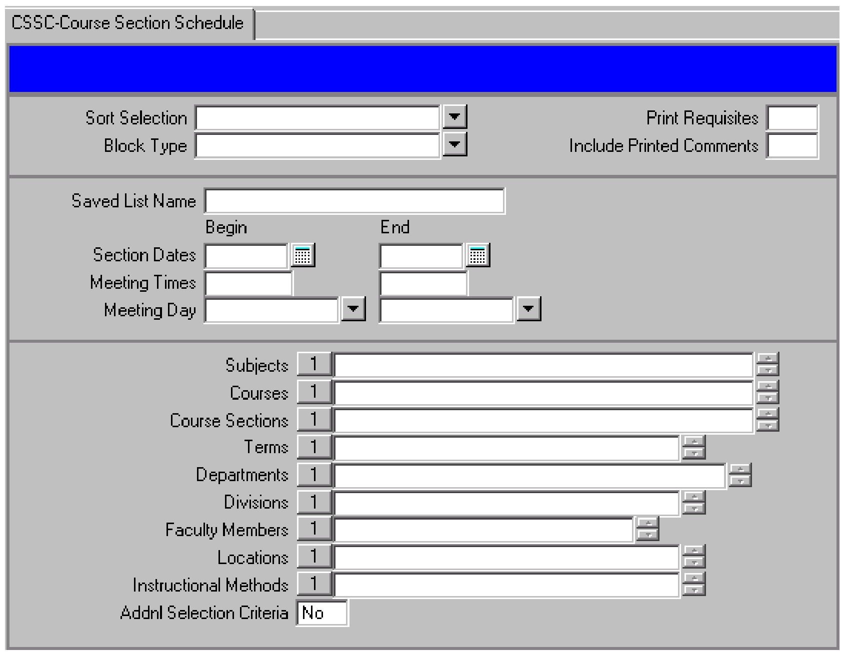


From the Total Enrollment field, you can detail to the Section Roster Inquiry (SINQ) form to view a list of students enrolled in the section.

Generating Section Schedules

After you have scheduled your course sections, you may want to generate a report listing these schedules. Initiate the printed schedule from the Course Section Schedule (CSSC) form.

Figure 40: Course Section Schedule (CSSC) Form



In the top part of the form, you can define the format and content of the schedule. In the middle and lower parts of the form, you can specify a saved list and other criteria to limit the sections included in the schedule.

Noteworthy Fields on the CSSC form

The fields described in this section are particularly important when generating a report that lists schedules. See online help for additional information about fields on this form.

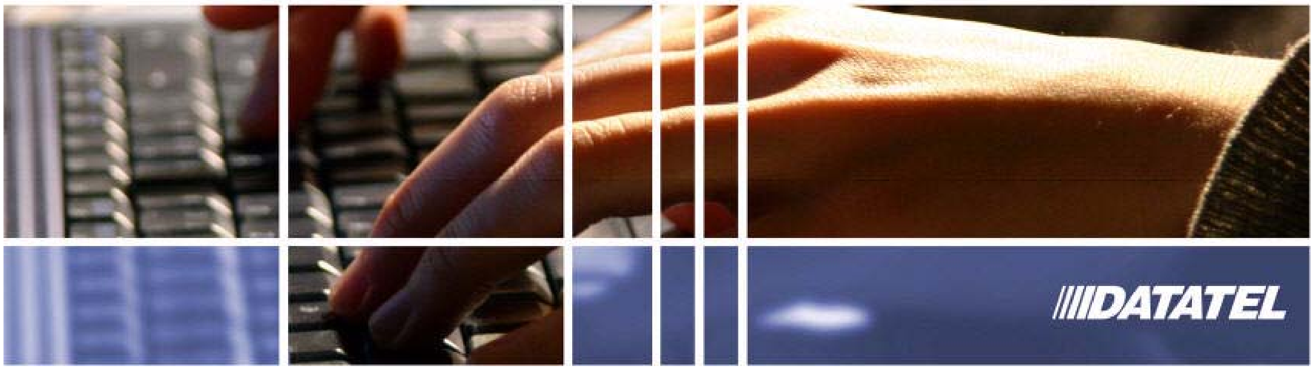
- **Sort Selection**. Use this field to define how you want Colleague to sort the schedule. The table below lists the default sort options.

Table 16: Section Schedule Sort Options

Enter…	To Sort By…
HS	Hierarchy[a] and Section
DS	Department and Synonym
SE	Section
SS	Subject and Synonym
D	Day and Time

a. “Hierarchy” sorts by school, division, and department

- **Block Type.** If you select the Day and Time sort in the Sort Selection field, you must also decide if you want a Block Type of (F)ull or (C)ondensed. The “full” option prints more information about each section than the “condensed” option.
- **Saved List Name.** The saved list must select records from the COURSE.SECTIONS file.



Using Curriculum Management

Waitlists

Defining Waitlist Criteria

Before You Begin

Before you define a waitlist for a section, you should set up the following:

Table 17: Information Needed Before You Define a Waitlist

Information Needed	Reference
Courses	page 53
Sections	page 103

Course Waitlists Overview

You can set up a course so that a waitlist starts when enrollment capacity has been met. Students who attempt to register for the course after capacity has been reached are given the option of putting their names on a waitlist.[1] Colleague evaluates the waitlist rating rules defined for the course and maintains a list of ranked students interested in taking the course.

See *Using Registration* for information on managing waitlists and how students are moved to available sections. See *Getting Started with Colleague Student* for information on setting up waitlists.

1. The registration control codes used during registration can affect the enrollment of students in a waitlisted course. If the control code is defined to allow enrollment in waitlisted courses, then Colleague allows a student to enroll in the course if a seat becomes available, even if there are other students already on a waitlist. For more information about defining registration controls see *Getting Started with Colleague Student*.

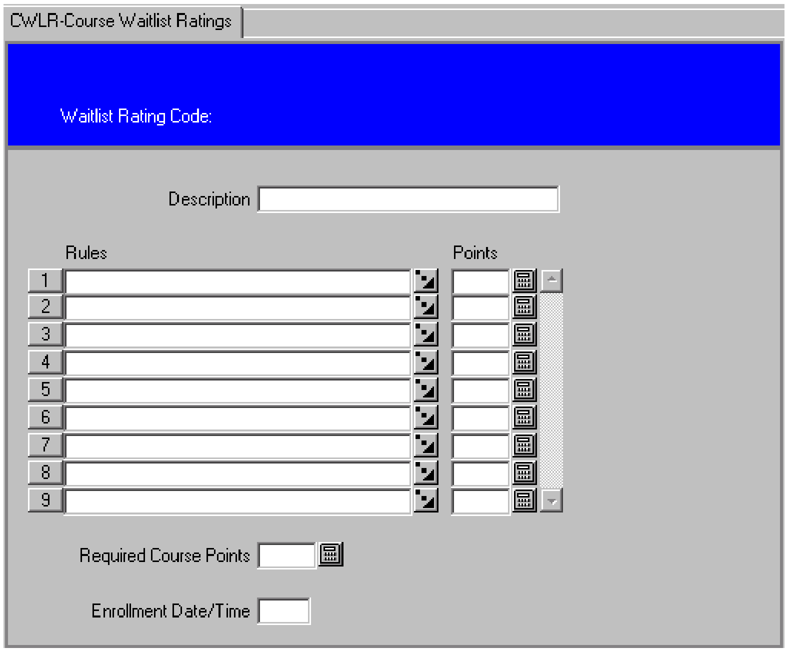
Waitlist Ratings

Students are eligible for newly available seats in the order they are listed on the waitlist. You can leave students on the list on a first on, first off basis or allow other factors, such as class, to determine in what order newly available seats are filled.

If you decide to allow other factors to affect the order students are placed waitlists, you can define waitlist rating rules which Colleague uses to evaluate students on the waitlist. For example, Datatel University allows seniors to have first priority on the waitlists for courses required to complete their academic program.

Use the Course Waitlist Ratings (CWLR) form, shown in figure 41, to define your waitlist rating rules.

Figure 41: Defining Course Waitlist Rating



For each waitlist rating rule you define, you must assign an associated number of points. If a rule evaluates true for a student, Colleague assigns the associated points to the student. If more than one rule is true for an individual, Colleague sums the associated points. These points are used to sort the list of students on a waitlist. The student with the greatest number of points is then the first on the waitlist, available for enrollment if a seat becomes available.

See *Getting Started with Colleague Student* for more information about defining and using rules.

Methods of Defining Waitlist Criteria

You can define your waitlist criteria as a combination of the following three methods:

- Course waitlist defaults that populate into all new course definitions
- Course restrictions that default into all new sections of that course
- Section restrictions

Table 18 shows the three methods of defining waitlist criteria and the reference to where you can find more information about each.

Table 18: Methods of Defining Waitlist Criteria

Method of Defining Waitlist Criteria	Reference
Course waitlist defaults	"Understanding Course Waitlist Defaults" beginning on page 169
Course waitlist criteria	"Understanding Course Waitlist Criteria" beginning on page 171
Section waitlist criteria	"Understanding Section Waitlist Criteria" beginning on page 175

Understanding Course Waitlist Defaults

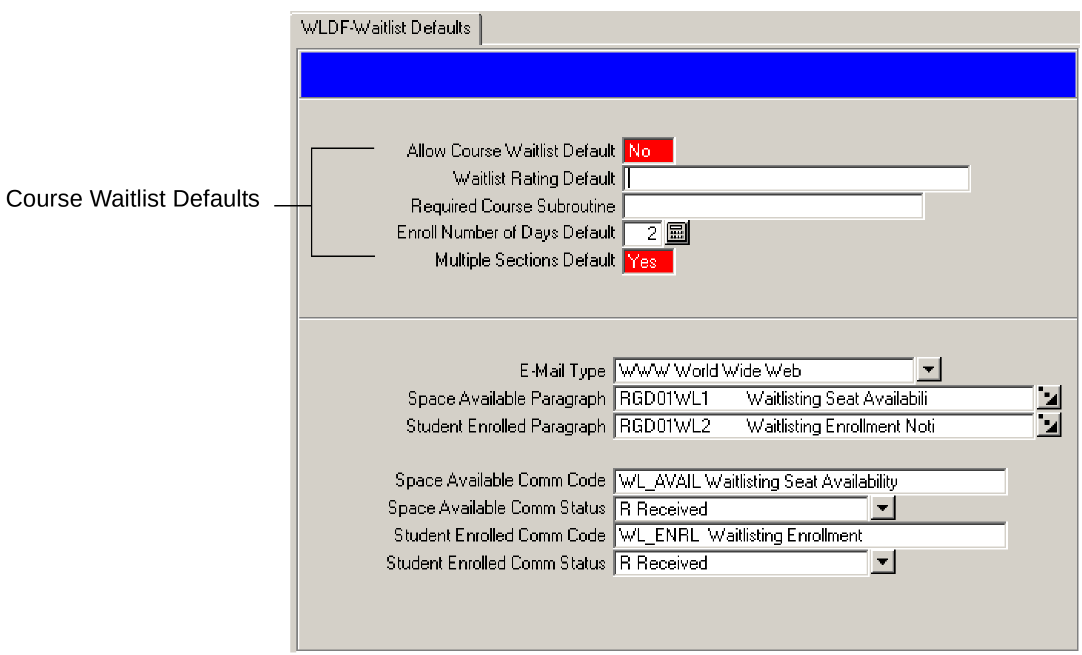
If you want the majority of your courses to have the same waitlist criteria, then define the criteria once with course defaults. Every course created after the defaults are set will inherit the default waitlist criteria. Courses created before the defaults are set will not be affected. You can override the waitlist defaults for individual courses. Refer to on-line help for further information.

Procedure for Defining Course Waitlist Defaults

Use the Waitlist Defaults (WLDF) form, shown in Figure 42, to set up your course waitlist defaults.

WLDF is also used to set up e-mail or documents that inform waitlisted students that a seat is available or that they are enrolled. For further information, see *Getting Started with Colleague Student*.

Figure 42: Defining Course Waitlist Defaults



Step 1. In the Allow Course Waitlist Default field, enter **Y** if you want to allow a waitlist to be created for each new course after enrollment passes capacity.

The value set here defaults into all courses, but can be overridden at the course and section level.

Step 2. In the Waitlist Rating Default field, enter the code of the waitlist rating criteria to use as the default for courses.

The code you enter here defaults into all courses, but can be overridden at the course and section level. If this field is blank, there is no rating code default for courses. See "Waitlist Ratings" on page 166 for more information about defining the waitlist ratings.

Step 3. In the Required Course Subroutine field, enter the subroutine name to be used to determine if the course is required.

The subroutine name you enter is used by Colleague to determine if a course is required for a student. In waitlist management, you can assign a rating for a course that is required by a student. Colleague uses the subroutine name that you enter in this field to determine if the course for which the student is waiting is required for that student.

If weighting based on required courses is not needed for waitlist management, you may leave this field blank.

Step 4. In the Enroll Number of Days Default field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

This field will be used as a default to all courses, where it will be used as a default to course restrictions by location and sections. If this field is left blank, there will be no default for courses.

Step 5. In the Multiple Sections Default field, enter **`Y`** to let students waitlist into multiple sections of the same course.

This field is used to default to courses (on the Course Restrictions [CRES] form) where it is used as a default to course restrictions by location if locations exist (displayed on the Course Restrs by Location [CLRS] form).

Even if you enter **`N`**, a student will be allowed to waitlist for multiple sections of the same course (and course locations if created for the course) if the sections are in different terms or do not overlap if there is no term.

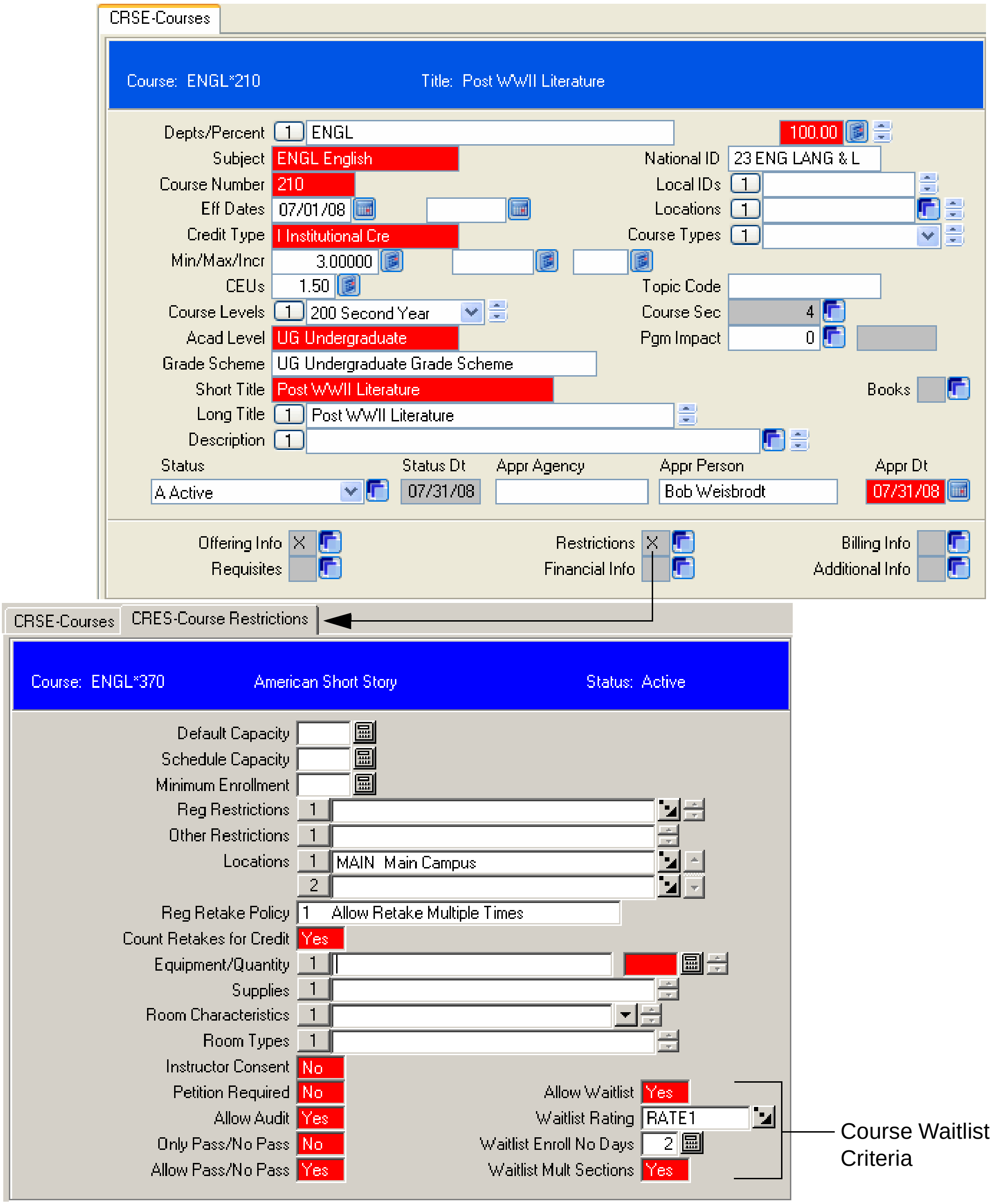
Step 6. Update the WLDF form.

Understanding Course Waitlist Criteria

You can define course waitlist criteria that default into each new section of that course. If you change the course waitlist criteria, it will not affect any existing sections of that course. You can override the waitlist defaults for individual sections.

Use the Course Restrictions (CRES) form to define waitlist criteria that default into each section of that course you create after setting the restrictions. You can access the Course Restrictions (CRES) form by detailing from the Restrictions field on the Courses (CRSE) form, as shown in Figure 43, or directly from the menu. For further information, refer to on-line help.

Figure 43: Defining Course Waitlist Criteria


CRSE-Courses
Course: ENGL*210
Title: Post WWII Literature
Depts/Percent
1
ENGL
100.00
Subject
ENGL English
National ID
23 ENG LANG & L
Course Number
210
Local IDs
1
Eff Dates
07/01/08
Locations
1
Credit Type
I Institutional Cre
Course Types
1
Min/Max/Incr
3.00000
CEUs
1.50
Topic Code
Course Levels
1
200 Second Year
Course Sec
4
Acad Level
UG Undergraduate
Pgm Impact
0
Grade Scheme
UG Undergraduate Grade Scheme
Short Title
Post WWII Literature
Books
Long Title
1
Post WWII Literature
Description
1
Status
Status Dt
Appr Agency
Appr Person
Appr Dt
A Active
07/31/08
Bob Weisbrodt
07/31/08
Offering Info
X
Restrictions
X
Billing Info
Requisites
Financial Info
Additional Info
CRSE-Courses
CRES-Course Restrictions
Course: ENGL*370
American Short Story
Status: Active
Default Capacity
Schedule Capacity
Minimum Enrollment
Reg Restrictions
1
Other Restrictions
1
Locations
1
MAIN Main Campus
2
Reg Retake Policy
1
Allow Retake Multiple Times
Count Retakes for Credit
Yes
Equipment/Quantity
1
Supplies
1
Room Characteristics
1
Room Types
1
Instructor Consent
No
Petition Required
No
Allow Audit
Yes
Only Pass/No Pass
No
Allow Pass/No Pass
Yes
Allow Waitlist
Yes
Waitlist Rating
RATE1
Waitlist Enroll No Days
2
Waitlist Mult Sections
Yes
Course Waitlist Criteria

Procedure for Defining Course Waitlist Criteria

Complete the following steps to define course waitlist criteria:

Step 1. In the Allow Waitlist field, if you enter **Y**, Colleague creates a waitlist after the capacity limits are reached.

If you enter **N**, Colleague does not create a waitlist, and the course is closed when the capacity is reached. You can define the default value for all courses on the Course Defaults (CDEF) form.

You can change the value on the course record as necessary. The value you define on the course record defaults to all sections you create from the course. You can change the value on each section record as necessary.

Step 2. In the Waitlist Rating field, the rating you defined on the Waitlist Defaults (WLDF) form defaults to the course record. You can change the rating as necessary. Colleague uses this rating to rank the priority of students on the waitlist.

The value you enter defaults to the sections you create from the course. If necessary, you can override the waitlist rating for each section.

If you leave the Waitlist Rating field blank, students are listed on the waitlist in the order in which they enrolled on it.

You can detail to the Course Waitlist Ratings (CWLR) form from the Waitlist Rating field, to further define the waitlist ratings for this course. See "Waitlist Ratings" on page 166 for more information about defining your waitlist ratings.

Step 3. In the Waitlist Enroll No Days field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

This field is used as a default to course locations. If course locations do not exist, this field is used as a default to all sections created from this course. It can be changed as needed at either level.

If this field is left blank, there will be no default for course locations, or for sections (if course location restrictions do not exist). In addition, your institution will not be able to use the waitlist status of Permission to Register.

This means that students cannot be offered seats through the Waitlist Availability (WLAV) process, and that waitlists will be handled manually through the following waitlist management forms:

- Course Waitlist Management (CWLM)
- Section Waitlist Management (SWLM)
- Course Waitlist Alternatives (CWLA)
- Section Cross-List Waitlist (SXWL)

Step 4. In the Waitlist Mult Sections field, enter **Y** to let students waitlist into multiple sections of this course.

Regardless of what you enter, a student will be allowed to waitlist for multiple sections of this course if the sections are in different terms or do not overlap dates if there is no term. This field will be used as a default to course locations.

Step 5. Update the CRES form.

Understanding Section Waitlist Criteria

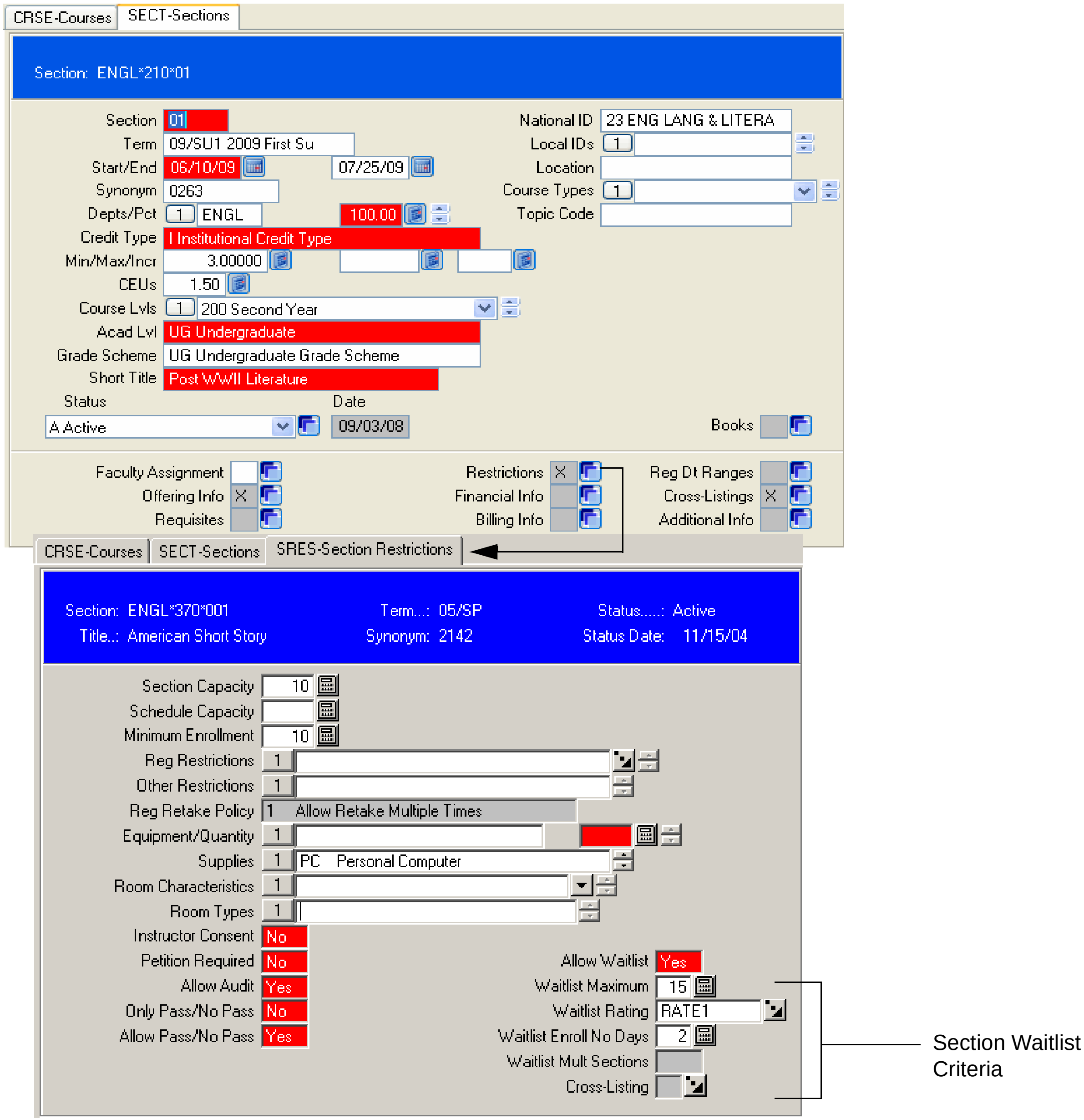
You can define waitlist criteria that applies to only a specific section of a course.

Use the Section Restrictions (SRES) form to define section waitlist criteria. You can access the Section Restrictions (SRES) form by detailing from the Restrictions field on the Sections (SECT) form, as shown in Figure 44, or directly from the menu.

For cross-listed courses, you can also specify whether to waitlist all sections after one section of the cross-list has started a waitlist. In addition, you can set a maximum number of students allowed on the waitlist. Use the Section Cross-List (SXRF) form to set these parameters.

For further information, refer to on-line help.

Figure 44: Defining Section Waitlist Criteria


CRSE-Courses
SECT-Sections
Section: ENGL*210*01
Section
01
Term
09/SU1 2009 First Su
Start/End
06/10/09
07/25/09
Synonym
0263
Depts/Pct
1
ENGL
100.00
Credit Type
I Institutional Credit Type
Min/Max/Incr
3.00000
CEUs
1.50
Course Lvls
1
200 Second Year
Acad Lvl
UG Undergraduate
Grade Scheme
UG Undergraduate Grade Scheme
Short Title
Post WWII Literature
Status
Date
A Active
09/03/08
National ID
23 ENG LANG & LITERA
Local IDs
1
Location
Course Types
1
Topic Code
Books
Faculty Assignment
Offering Info
X
Requisites
Restrictions
X
Financial Info
Billing Info
Reg Dt Ranges
Cross-Listings
X
Additional Info
CRSE-Courses
SECT-Sections
SRES-Section Restrictions
Section: ENGL*370*001
Title..: American Short Story
Term...: 05/SP
Synonym: 2142
Status.....: Active
Status Date: 11/15/04
Section Capacity
10
Schedule Capacity
Minimum Enrollment
10
Reg Restrictions
1
Other Restrictions
1
Reg Retake Policy
1
Allow Retake Multiple Times
Equipment/Quantity
1
Supplies
1
PC
Personal Computer
Room Characteristics
1
Room Types
1
Instructor Consent
No
Petition Required
No
Allow Audit
Yes
Only Pass/No Pass
No
Allow Pass/No Pass
Yes
Allow Waitlist
Yes
Waitlist Maximum
15
Waitlist Rating
RATE1
Waitlist Enroll No Days
2
Waitlist Mult Sections
Cross-Listing
Section Waitlist Criteria

Procedure for Defining Section Waitlist Criteria

Complete the following steps to define section waitlist criteria:

Step 1. In the Allow Waitlist field, enter **Y** if you want to allow a waitlist to be created for this section after enrollment passes capacity.

If you enter **N**, students are not given the option of enrolling on a waitlist for this section at registration.

Step 2. In the Waitlist Maximum field, enter the maximum number of students allowed on a waitlist for this section. After that number of students are enrolled on the waitlist, students are no longer given the waitlist option at registration.

If you leave this field blank, there is no limit to the number of students who can waitlist for this section.

Step 3. In the Waitlist Rating field, enter the name of the waitlist rating you want to use for a waitlist of this section.

If you leave this field blank, the students are listed in the order in which they enrolled on the waitlist.

The waitlist rating defined for the course defaults to the newly created sections of the course. You can override the course rating and define a rating for a particular section. If you leave the Waitlist Rating field blank, students are listed on the waitlist in the order in which they enrolled on it.

You can detail to the Course Waitlist Ratings (CWLR) form from the Waitlist Rating field, to further define the waitlist ratings for this section. See "Waitlist Ratings" on page 166 for more information about defining your waitlist ratings.

Step 4. In the Waitlist Enroll No Days field, enter the number of days a student has to accept an offer of enrollment from a waitlist.

If you leave this field blank, your institution will not be able to use the waitlist status of Permission to Register. This means that students cannot be offered seats through the Waitlisting Availability (WLAV) process, and that waitlists will be handled manually through the following waitlist management forms:

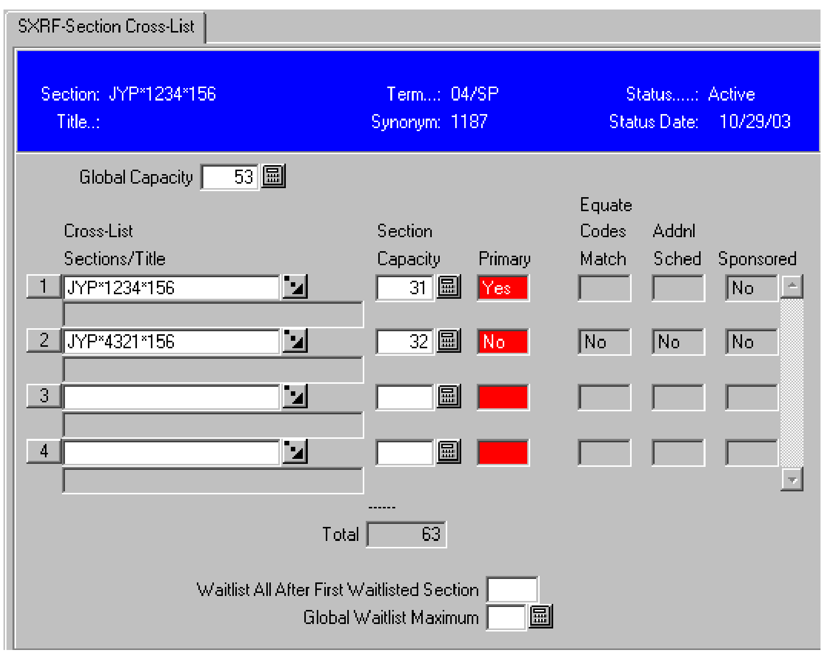
- Course Waitlist Management (CWLM)
- Section Waitlist Management (SWLM)
- Course Waitlist Alternatives (CWLA)
- Section Cross-List Waitlist (SXWL)

Step 5. Update the SRES form.

Step 6. If the section is cross-listed sections, continue with Step 7.

Step 7. Access the Section Cross-List (SXRF) form.

Figure 45: Section Cross-List (SXRF) Form



Step 8. In the Waitlist All After First Waitlisted Section field, enter **Y** to waitlist when any section in the cross-list has a waitlist.

Enter **Y** if you want to place students on a waitlist as soon as any section in the cross-list has a waitlist. If you do this, you can manage a single waitlist for all cross-listed sections using the Section Cross-List Waitlist (SXWL) form.

To allow students to continue to register in sections with seats even though one of the cross-listed sections is full, enter **N** or leave this field blank.

Waitlisting will be an option only if the section allows waitlisting on the Section Restrictions (SRES) form.

Note: If you leave both the Section Capacity and Global Capacity fields blank, then a waitlist is never started as enrollment is unlimited at any level. If you leave the Section Capacity blank for all sections in the cross-list, but enter a number in the Global Capacity, then a waitlist is started for a section when the Global Capacity is exceeded, regardless of what is entered in this field.

In this case, where there are no section capacities, but there is a global capacity, the SXWL form can also be used to manage the waitlist.

Step 9. In the Global Waitlist Maximum field, enter the maximum number of students allowed on the waitlist. This field limits the number of students who can be put on all the waitlists for all the sections in the cross-list.

Step 10. Update the SXRF form.

Generating a Course Waitlist Report

Before You Begin

Before you generate a waitlist for a section, you should set up the following:

Table 19: Information Needed Before You Generate a Course Waitlist Report

Information Needed	Reference
Courses	page 53
Sections	page 103
Waitlist criteria	page 165
Waitlist ratings	See *Getting Started with Colleague Student* for more information about defining these codes.
Locations	
Academic terms	Academic Records section of *Getting Started with Colleague Student*

Understanding Course Waitlists

You can set up a course so that a waitlist starts when enrollment capacity has been met. Students who attempt to register for the course after capacity has been reached are given the option of putting their names on a waitlist. Colleague applies the waitlist rating rules defined for the course and maintains a list of ranked students interested in taking the course.

Note: The registration control codes used during registration can affect the enrollment of students in a waitlisted course. If the control code is defined to allow enrollment in waitlisted courses, then Colleague allows a student to enroll in the course if a seat becomes available, even if there are other students already on a waitlist. For more information about defining registration controls, see *Getting Started with Colleague Student*.

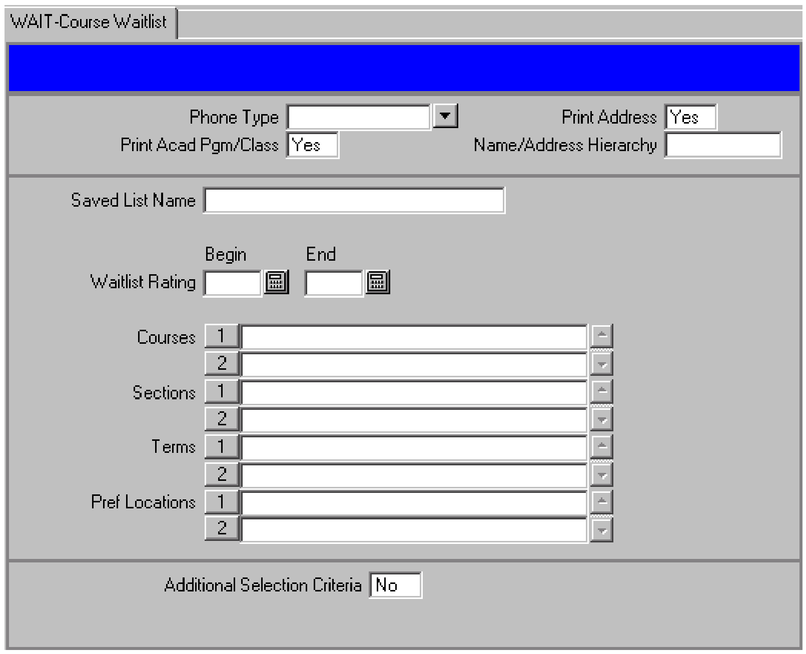
For more information about defining waitlists, see "Defining Waitlist Criteria" beginning on page 165.

You can use the waitlist information to make decisions about opening other sections to a popular course or to change the location to allow a larger capacity.

Generating a Course Waitlist Report

Use the Course Waitlist (WAIT) form to generate a waitlist report for a course or a group of courses. You can access the WAIT form from the menu.

Figure 46: Course Waitlist (WAIT) Form



Select the criteria that describe which courses you want to report. The criteria you list define the courses Colleague processes in this batch. You can enter the name of a saved list with records from the WAIT.LIST file. See the online help for the WAIT form for more information about specific fields.

Procedure for Generating a Course Waitlist Report

Complete the following steps to generate a report about course waitlists:

Step 1. Familiarize yourself with the procedure for generating a course waitlist report.

See “Understanding Course Waitlists” on page 182.

Step 2. Access the Course Waitlist (WAIT) form.

Step 3. Select the criteria that describes the courses you want to process.

Step 4. If you need to define additional criteria for selecting specific course sections, go to the Additional Selection Criteria field.

Otherwise, continue with Step 7.

Step 5. Enter `Y` and update the WAIT form.

The Additional Selection Criteria form is displayed.

Step 6. Complete the Additional Select Criteria form.

Step 7. Save the information on this form.

The Change Peripheral Defaults form is displayed.

Step 8. Accept the defaults or change the name of the default printer, select a different printer, or choose to have the reports sent to a hold file.

The Phantom Mode Specification form is displayed.

Step 9. If you want this process to run in the background or phantom mode, complete the Phantom Mode Specification form. Otherwise, leave this form blank.

Step 10. Update the form to begin the process.

Using Curriculum Management

Appendixes

Duplicate Course Section Reports

In This Appendix

This appendix includes information about how to use the Duplicate Course Section Reports (DCSR) form to generate reports of duplicate course sections.

Table 20: Topics in This Appendix

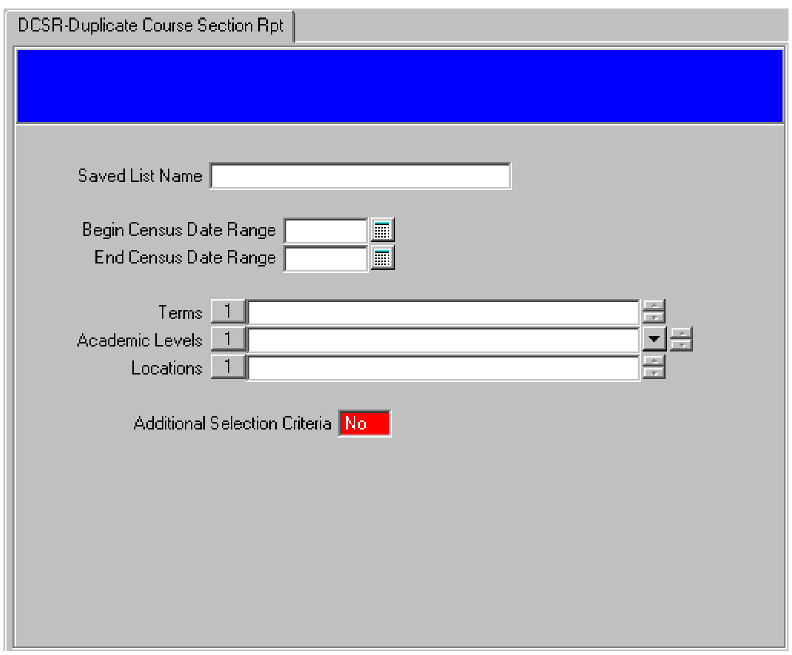
Understanding Duplicate Course Sections

After creating course sections for a particular term, academic level, or location, you can use the Duplicate Course Sections Rpt (DCSR) process to check for duplicated course sections. You can limit the course sections to be included in this process by specifying a term, section dates, academic levels, locations, or by using additional selection criteria.

The Duplicate Course Sections Rpt (DCSR) Form

Use the Duplicate Course Sections Rpt (DCSR) form to produce a report of the duplicate course sections.

Figure 47: Duplicate Course Sections Rpt (DCSR) Form



Noteworthy Fields on the DSCR form

The fields described in this section are particularly important when producing a report of the duplicate course sections. See online help for additional information about fields on this form.

The Saved List Name Field

You can use a saved list of IDs from the COURSE.SECTIONS file to select the course sections you want to process. You can also use a saved list as a basis for selecting the course sections and narrow the selection using the other fields on the DCSR form.

The Begin Census Date Range Field

Use the Begin Census Date Range to select course sections that have a census date on or after the date you entered. If there is no census date on the course section, it will not be selected. If you do not enter a date, Colleague selects all course sections to process.

Note: If you enter a date, you cannot enter terms.

Use Begin and End Census Dates together to select a range of course sections. Colleague selects records for which the SEC.FIRST.CENSUS.DATE virtual field falls between the dates entered. This is the first line in the multi-valued census date field.

The End Census Date Range Field

Use the End Census Date Range to select course sections that have a census date on or before the date you entered. If there is no census date on the course section, it will not be selected. If you do not enter a date, Colleague selects all course sections to process.

Note: If you enter a date, you cannot enter terms.

Use Begin and End Census Dates together to select a range of course sections. Colleague selects records for which the SEC.FIRST.CENSUS.DATE virtual field falls between the dates entered. This is the first line in the multi-valued census date field.

The Terms Field

To select course sections during a particular term, enter the term ID. Colleague processes all course sections during the terms that you have identified. If you also identified a saved list name, Colleague only selects from that saved list the course sections that are offered in the selected terms.

Note: If you enter terms, you cannot enter reporting dates.

The Academic Levels Field

You can limit the course sections included in this process by selecting specific academic levels.

If you identify one or more academic levels and do not use any of the other selection criteria on the DCSR form, then Colleague includes all course sections with the selected academic level(s).

If you identify one or more academic levels and use any of the other selection criteria on the DCSR form, then Colleague includes all course sections with the selected academic level(s) that meet the other selection criteria.

The Locations Field

You can choose the course sections included in this process by selecting specific locations.

If you identify one or more locations and do not use any of the other selection options on the DCSR form, then Colleague includes all course sections with the selected location(s).

If you identify one or more locations and use any of the other selection options on the DCSR form, then Colleague includes all course sections with the selected location(s) that meet the other selection criteria.

Generating the Duplicate Course Section Report

Step 1. Access the Duplicate Course Section Rpt (DCSR) form.

Step 2. Enter the following optional selection criteria:

- Section dates
- Terms
- Academic levels
- Locations

Step 3. Run the process by finishing from the form

Step 4. Review the report and make any necessary changes for the course sections.

Using Facilities Profile

Before You Begin

Before you define your buildings, rooms, and equipment, you must have already defined your campuses. You must also have already defined the following codes. See *Getting Started with the Core System* for more information on setting up these codes.

Codes Needed to Define Buildings

- Sector codes
- Country codes
- Institution codes
- Ownership Status codes
- Construction Type codes
- Building Condition codes
- Building Access codes
- Building Type codes

Codes Needed to Define Rooms

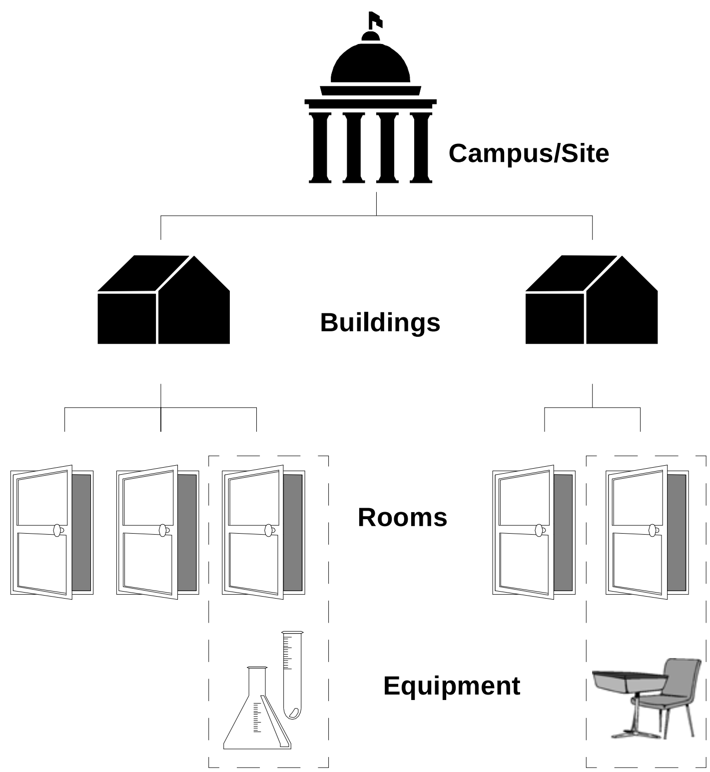
- Room Type codes
- Room Usage codes
- Category of Use codes
- Usage codes
- Room Characteristics codes
- Room Access codes
- Wing codes
- Room Rate Class codes

Understanding Facilities

The Facilities Profile module lets you define all of the buildings, rooms, and types of equipment used at each of your institution's campuses or sites. After you have defined these facilities, you can book them for courses, student housing, and miscellaneous events.

For each campus or site at your institution, you can define one or more buildings. Each building is made up of one or more rooms. Types of fixed equipment (such as lab equipment) can be associated with a particular room. Figure 48 illustrates the relationships of the various facilities that you can define in the Facilities Profile module. You can define multiple campuses or sites with similar structures.

Figure 48: Relationships of Facilities



Using Facilities With Other Modules

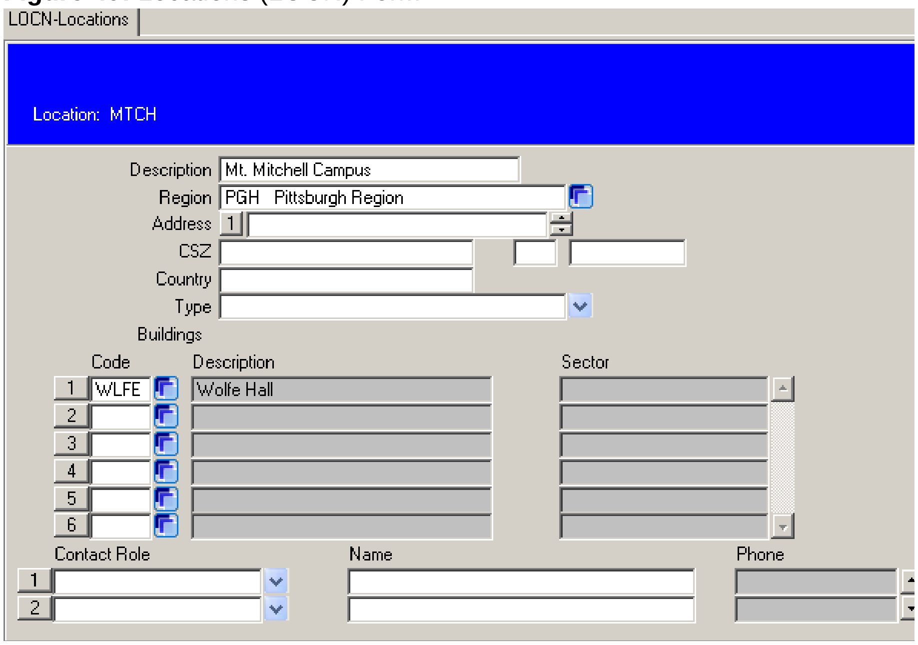
The Facilities Profile module stores descriptions of specific buildings and rooms at your institution. In the Curriculum Management module, you can define the room and equipment requirements for a particular course. Similarly, you can define room requirements for students in the Residence Life module. The room descriptions must be accurate and complete in order for the Scheduling module to work properly. Facilities must be set up prior to assigning resources and facilities to events in the Activities and Events module.

The Facilities Profile module is not designed to store information about specific pieces of equipment. Instead, it stores information about the quantities and types of equipment available in a particular room. In addition, the Facilities Profile module does not store information about “portable” equipment, which is equipment that is intended to be moved from one room to another. If your institution needs to record detailed information about specific pieces of equipment, or if your institution needs to schedule specific pieces of portable equipment, use the Fixed Assets module to record the detailed information about the equipment.

Campuses and Sites

Use the Locations (LOCN) form to define all of the campuses or sites for your institution.

Figure 49: Locations (LOCN) Form

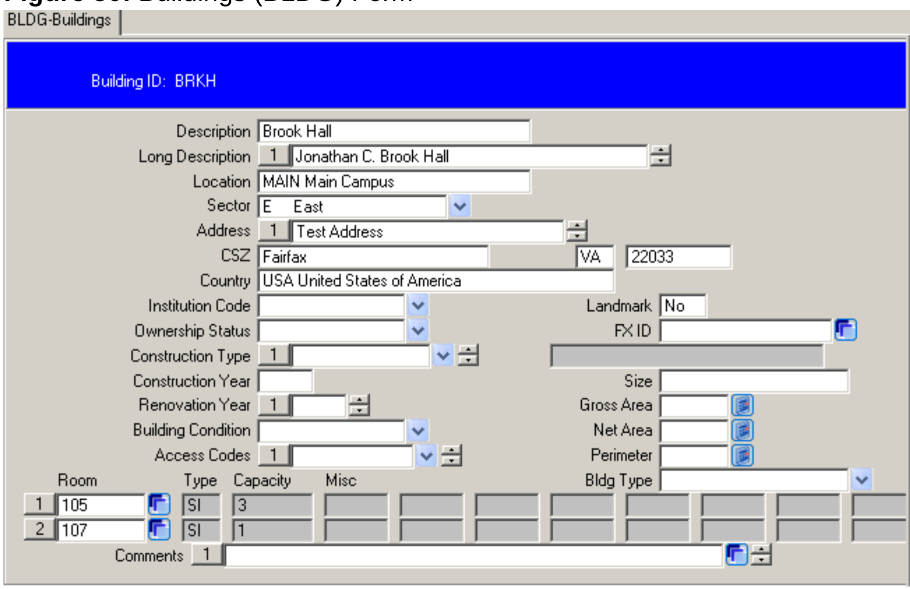


In Colleague you set up Locations to represent the different campuses or sites at your institution. For each location you can then identify the buildings in use at that campus or site. For example, adding a code to Buildings adds a building to the Location form. The description is the name of the building and the sector is where the building is located on campus.

Buildings and Rooms

Use the Buildings (BLDG) form to define the buildings and rooms at a particular site. You can access the BLDG form directly from the menu or by detailing from the Locations (LOCN) form.

Figure 50: Buildings (BLDG) Form



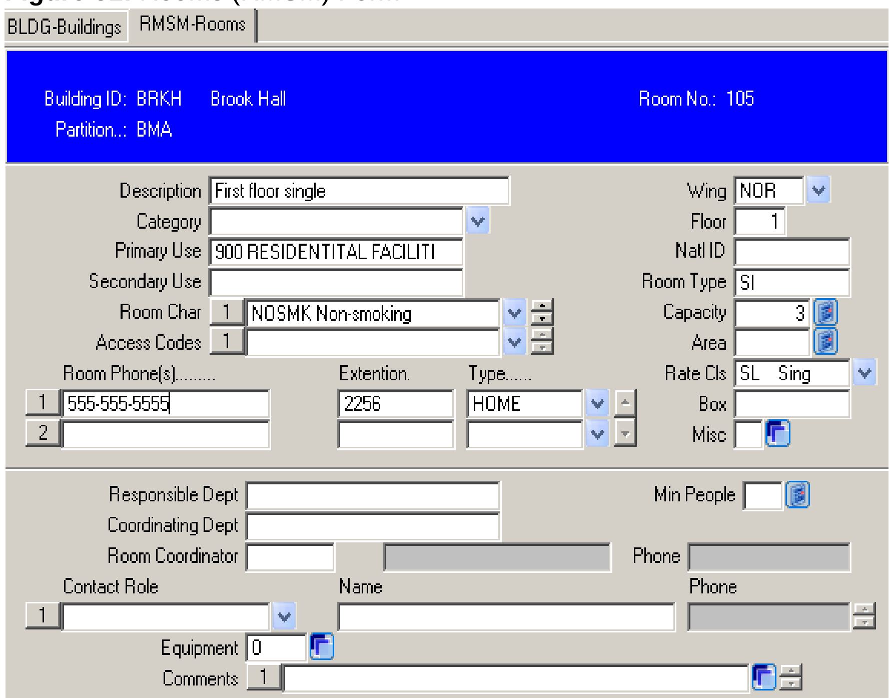
Buildings and Locations

In a typical workflow, you would access the BLDG form as a detail form from the Locations (LOCN) form, automatically linking the building to the location. However, the BLDG form is available from any menu. If you create a building record by accessing the BLDG form directly, be sure to enter a location in the Location field to link the building to a particular location.

Room Information

Use the Room field to identify the rooms in a building. To add a new room to the building, go to a blank line and detail to the Rooms (RMSM) form.

Figure 51: Rooms (RMSM) Form



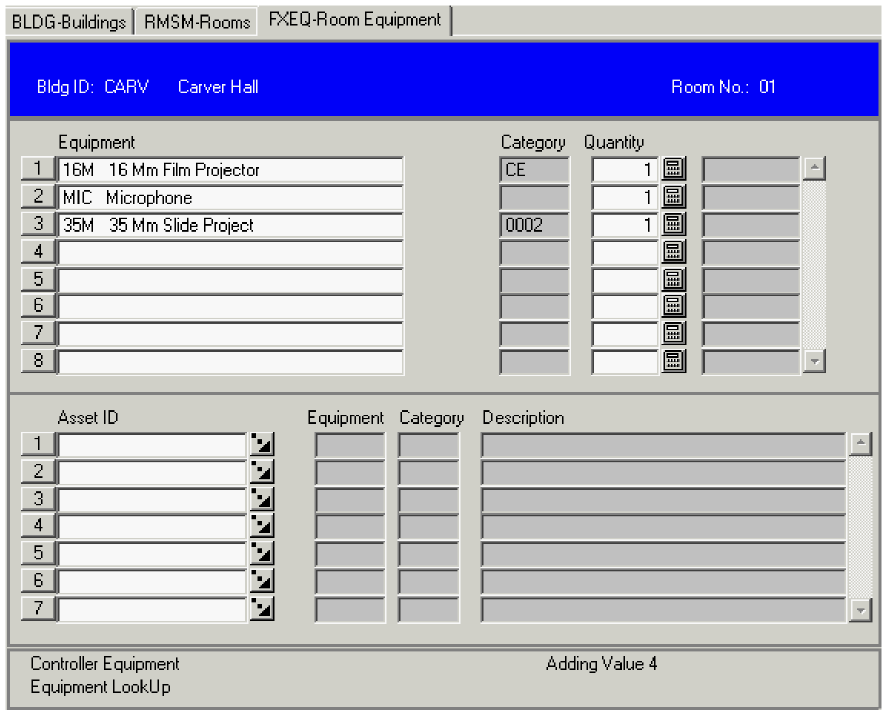
If you plan to use room requirements from the Curriculum Management or Residence Life modules to automatically schedule use of the rooms, be sure to complete the following fields:

- Categories
- Primary Use and Secondary Use
- Room Characteristics
- Access codes
- Wing
- Floor
- Room Type
- Capacity
- Rate Class
- Room Box Number
- Miscellaneous codes

Equipment

From the Rooms (RMSM) form, you can access the Room Equipment (FXEQ) form, where you can associate quantities of specific types of equipment to a room. Examples of types of equipment include furniture and computer equipment.

Figure 52: Room Equipment (FXEQ) Form



The Facilities Profile module was designed to store information about the quantities and types of equipment that are a relatively permanent part of a room. The types (categories) of equipment are intended to be general in nature, such as computer equipment or furniture. If your institution needs to record more specific information about the equipment in a particular room, you can do so in one of the following ways:

- Make your equipment codes very specific (for example, “486 DX PC” or “HP LaserJet 4” instead of “Computer Equipment”).
- If your institution uses the Fixed Assets module, you can assign specific pieces of equipment to a room. The equipment that you want to assign must already exist in the Fixed Assets module.

Workflows for Creating Facilities

You can define your facilities in a number of ways. A smooth workflow is to define a particular campus or site and then define all of the associated buildings. This workflow is better suited to individuals or smaller work teams. As you define the buildings, you can define the rooms in each building. As you define the rooms, you can define the equipment in each room. The forms used to define your facilities were designed for this type of workflow, and the procedure on page 204 assumes that this is the workflow your institution uses.

You may choose to define all of your campuses or sites first, then create all of your buildings and associate them to a campus or site. After you have created your buildings, you can then define the rooms in the buildings and the equipment in the rooms. You could use a workflow like this if you have several people entering facility information. One person could set up campuses, then other individuals could define the buildings on those campuses. Then another group of people could set up the rooms and equipment for those buildings.This is convenient for when you would add new rooms or buildings later.

Procedure for Defining Facilities

Complete the following steps to define your facilities. This procedure provides the steps necessary to define buildings, rooms, and equipment for one particular campus or site. If your institution has multiple campuses or sites, repeat this procedure to define each one.

Step 1. Review "Understanding Facilities" on page 197.

Step 2. Access a campus/site record on the Locations (LOCN) form.

Make sure that you do not create a second record for an existing Location. Follow your institution's guidelines on searching for duplicate records before creating a new one.

Step 3. Enter information to define this campus or site.

Enter a description and other applicable information for the campus or site.

Use online help if you need more information about a particular field.

Step 4. Enter a building code for a building associated with this campus or site.

In the Buildings group of fields, maintain a list of buildings at this campus or site.

To add a building to this location, go to a blank line. Enter the Building code if you know it, or perform a LookUp to locate an existing Building code. If the building does not yet exist in Colleague, enter a new Building code (up to four characters) in the Code column. Colleague opens the Buildings (BLDG) form where you can view and maintain additional information about the building.

Note: Be sure that you do not create a second Building code for an existing building. Follow your institution's guidelines on searching for duplicate records before creating a new one.

To view or maintain information about a building that is already listed here go the desired line and detail to the BLDG form.

Step 5. From the BLDG form, enter information to define the building.

Enter a description of the building along with any other information needed for this building.

Use online help if you need more information about a particular field.

Step 6. Enter a room number to define a room in this building.

Go to the first blank line of the Room field. Enter a room number at the Enter a Room Number to Add prompt. When you add a new room number, the Rooms (RMSM) form is displayed. The RMSM form is available only as a detail form.

You can modify information for an existing room by selecting that room and detailing to the RMSM form.

Step 7. From the RMSM form, enter information to define the room.

Enter a description of the room along with any other information or comments to describe the room.

Use online help if you need more information about a particular field.

Step 8. Enter any equipment located in this room.

Go to the Equipment field and detail to the Room Equipment (FXEQ) form.

In the Other Equipment group add general information about the quantities and types of equipment in this room.

In the Room Equipment group, if your institution uses the Fixed Assets module, you can record specific pieces of equipment in this room.

The Room Equipment (FXEQ) form is available only as a detail form.

If a specific piece of equipment is not defined in the Fixed Assets module, you cannot enter it in the Room Equipment group on the FXEQ form.

Step 9. Save your work.

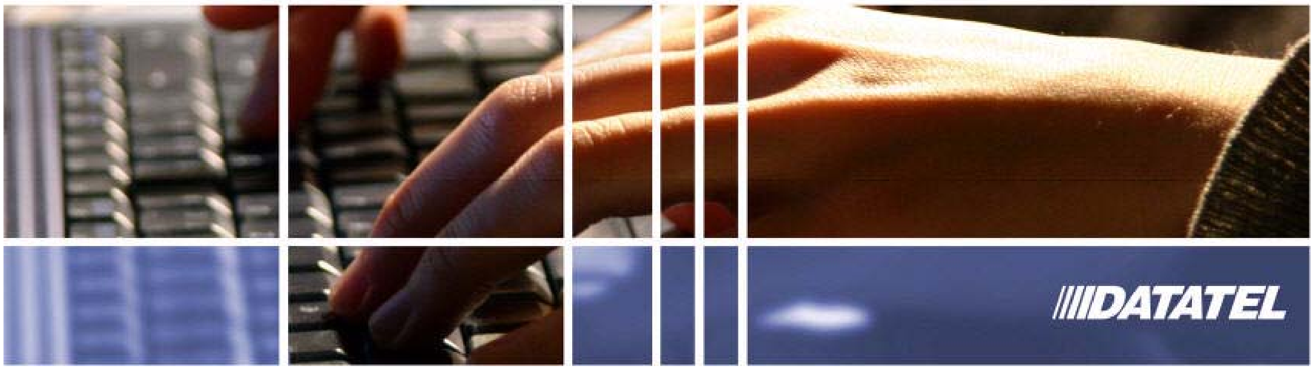
To define another room in the same building, go back to the BLDG form and add another room number (see Step 6).

To define another building at this campus or site, go back to the LOCN form for this campus or site and add another building (see Step 4).

To define another campus or site, save your work from the LOCN form and repeat this procedure.

When you save your changes, you are returned to the previous form. You must successively save your changes at each form or the information will be lost.

For example, suppose you begin at the LOCN form and create a new Building record, and populate the building with rooms. Even if you save your work when you exit the RMSM and BLDG forms, if you then cancel out of the LOCN form without saving that Location record, Colleague does not save the Building or Room records you created or updated.



Using Curriculum Management

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