

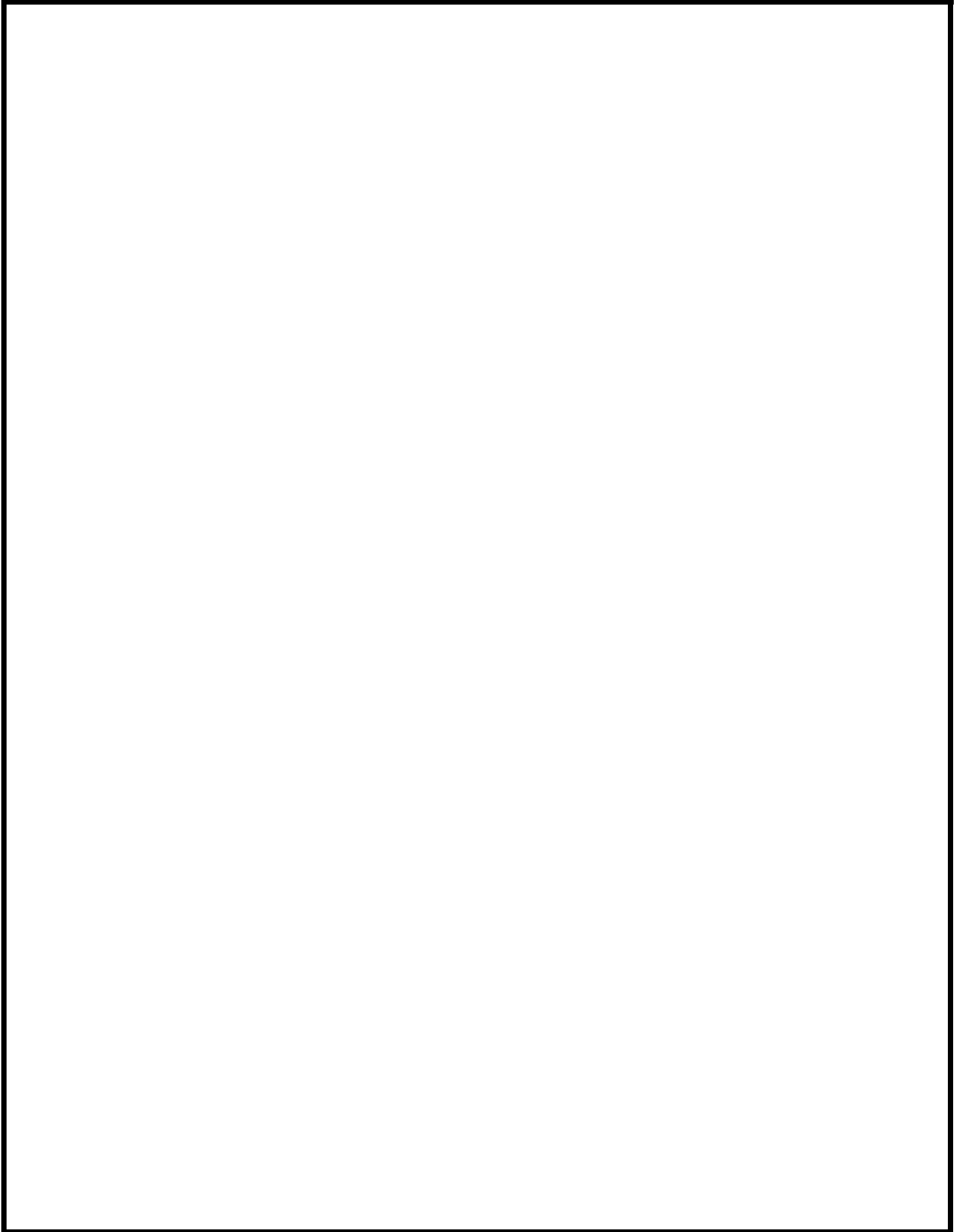
Using Degree Audit

Reissued Manual as of January 21, 2011

This is a new edition of the *Using Degree Audit* manual, for Release 18 of Colleague. This edition replaces the previous edition dated June 29, 2009, and incorporates the changes delivered with software update SU53296.11-1805.

The Primary Changes Made

Section	Pages	Changes Made
Running Academic Evaluations for Proposed Programs	130-132	Created information for the new Batch Proposed Program (BPRP) form.



Datatel Colleague® Student

Using Degree Audit

Release 18

January 21, 2011

For last-minute updates and additional information about this manual, see AnswerNet page 2333.07.



Using Degree Audit

© 2011 Datatel, Inc.
All Rights Reserved

The information in this document is confidential and proprietary to and considered a trade secret of Datatel, Inc., and shall not be reproduced in whole or in part without the written authorization of Datatel, Inc. The information in this document is subject to change without notice.

Colleague and ActiveCampus are registered trademarks of Datatel, Inc. ActiveAlumni and ActiveAdmissions are trademarks of Datatel, Inc. Other brand and product names are trademarks or registered trademarks of their respective holders.

Datatel, Inc.
4375 Fair Lakes Court
Fairfax, VA 22033
(703) 968-9000
(800) DATATEL
www.datatel.com

Table of Contents

11 Introduction

13 About This Manual

- 13 Who Should Read This Manual
- 13 What This Manual Covers
- 14 How This Manual Is Organized
- 15 Where to Find More Information
- 17 Typographical Conventions
- 18 Important Notices
 - 18 Alerts
 - 18 Notes
 - 18 Technical Tips

19 About Degree Audit

- 19 In This Chapter
- 20 About Degree Audit
 - 21 Interfaces with Other Areas in Colleague
- 22 Accessing Colleague and Degree Audit

23 Academic Programs

25 Defining a New Academic Program

- 25 In This Chapter
- 26 Before You Begin
- 27 Understanding Academic Programs
- 28 Defining an Academic Program
 - 29 Associating Requirements with a Program
 - 30 Academic Requirement Hierarchical Structure
 - 31 Options
 - 32 Defaults
 - 33 Compounding
 - 34 Procedures for Defining an Academic Program

35 Defining Requirements

- 35 In This Chapter
- 36 Before You Begin
- 37 Understanding Requirements
 - 37 Naming Requirements
 - 38 Possible Workflows

39	Creating a Standard Requirement
39	Fields Used for Reporting Purposes
40	Noteworthy Fields on the REQU Form
41	Procedure for Creating a Requirement
43	Creating a Requirement by Copying an Existing Requirement
44	Associating Requirements to a Standard Academic Program
45	Setting the Print Location for Additional Requirements
46	Understanding Subrequirements and Groups
48	Defining Subrequirements and Groups
50	Specifying the Subrequirement and Groups
51	Setting Up Subrequirement Print Text
51	Setting Up Print Text for a Group
52	Retrieving the Subrequirement
52	Correcting Specification Errors
53	Procedures for Defining Subrequirements
54	Changing a Subrequirement or Group

55 Custom Programs

57 Creating a Custom Program

57	In This Chapter
57	Before You Begin
58	Understanding Custom Programs
58	What is an Academic Program?
58	What is a Custom Academic Program?
58	Adding Constituents
59	Adding a Standard Requirement
60	Reviewing Student Program Requirements
61	Procedures for Adding Standard Requirements to a Program
62	Adding a Custom Requirement
63	Noteworthy fields in the QCRS Form
64	Correcting Errors in the Specification
66	Procedure for Adding a Custom Requirement to a Student's Program

67 Granting Exceptions

67	In This Chapter
67	Before You Begin
68	Understanding Exceptions
69	Setting Up Exceptions

71	Program-Level Exceptions
74	Exception Form Attributes
74	Defining the Exception Print Text
75	Procedure for Granting Program-Level Exceptions
76	Requirement-Level Exceptions
77	Waiving the Entire Requirement
78	Procedures for Granting Requirement-Level Exceptions
78	Procedure for Granting Exceptions to the Requirement GPA
79	Procedure for Granting Exceptions to the Requirement Institutional Credits
80	Procedure for Granting an Exception to the Number of Subrequirements
81	Procedure for Waiving a Requirement
82	Procedure for Replacing the Entire Requirement
83	Subrequirement-Level Exceptions
84	Exceptions Overview
85	Granting Exceptions to the Entire Subrequirement
85	Replacing the Entire Subrequirement
85	Waiving the Entire Subrequirement
86	Procedure for Granting Exceptions to the Entire Subrequirement
87	Granting Exceptions to Items within a Subrequirement
87	Changing or Waiving the Subrequirement GPA
87	Changing the Subrequirement Inst Credits
87	Changing or Waiving the Subrequirement Count
87	Procedure for Granting Exceptions to a Subrequirement GPA or Credit Count
89	Granting Exceptions to a Group within a Subrequirement
89	Replacing the Entire Group
89	Waiving the Entire Group
89	Allowing Additional Courses
90	Procedure for Granting Exceptions to a Group within a Subrequirement
92	Granting Exceptions to Items within a Group
92	Changing or Waiving the Subrequirement Credit Count
92	Waiving or Substituting Courses
93	Procedure for Granting Exceptions to Items within a Group (Credit Count or Courses)

95	Student Advising
97	Evaluating a Student's Academic Progress
97	In This Chapter
97	Before You Begin
98	Understanding Program Evaluation
98	Running the Evaluation
99	Overriding Evaluator Decisions
101	Procedures for Overriding the Evaluator's Application of Academic Credit
103	Performing a What-If Analysis
103	In This Chapter
103	Before You Begin
104	Understanding the What-If Analysis
104	Academic Programs
105	Student Academic Activity
106	Proposing a Student Program
106	Noteworthy Fields on the PSPR Form
111	Procedure for Evaluating a Proposed Student Program
113	Running Academic Evaluations
113	In This Chapter
113	Before You Begin
114	Understanding Student Evaluations
115	Student Academic Activity
115	Academic Programs
116	Parts of an Academic Evaluation
117	Header
117	Top Custom Paragraph
118	Program Information
120	Evaluation Results
121	Parts of Evaluation Results
122	Other Courses
122	Bottom Custom Paragraph
122	Notes
123	Running Individual Evaluations
124	Noteworthy Fields on the EVAL Form
125	Procedure for Running & Printing Individual Academic Evaluations

126	Running Batch Evaluations
127	Noteworthy Fields on the BEVL Form
128	Procedure for Running and Printing Batch Academic Evaluations
130	Running Academic Evaluations for Proposed Programs
131	Noteworthy Fields on the BPRP Form
132	Procedure for Running and Printing Batch Academic Evaluations for a Proposed Program
133	HTML Student Evaluation Reports
133	Viewing HTML Reports
134	Printing HTML Reports

135 Appendices

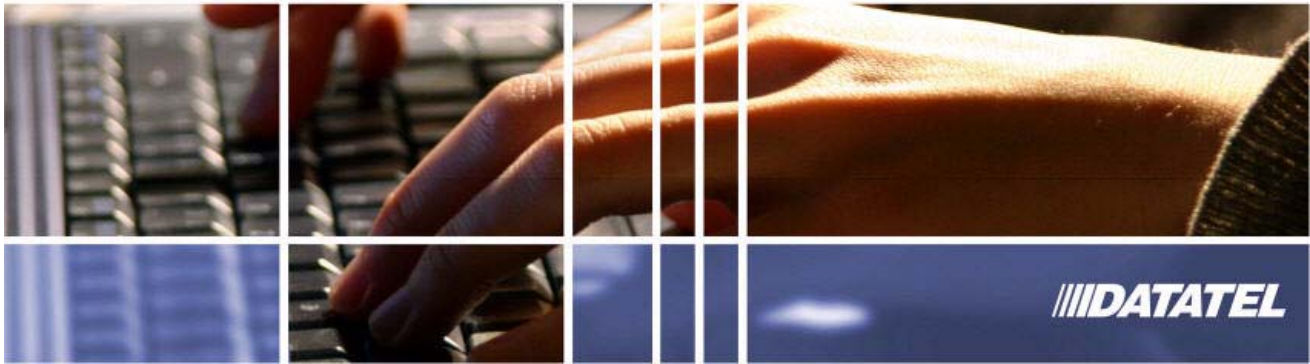
137 Degree Audit Syntax

137	Understanding Degree Audit Syntax
138	Additional Rules, Notes and Tips:
141	How to Build a Group
141	TAKE Phrases
142	Selection Phrases
142	Ceilings
143	Additional Requirements
144	Evaluation Directives
145	Other Phrases

147 HTML Report Configuration

147	In This Chapter
147	Before You Begin
148	Understanding HTML Report Generation

Index



Using Degree Audit

Introduction

About This Manual

Who Should Read This Manual

Anyone who is responsible for advising students, tracking students' progress toward graduation, and facilitating the review of alternate degree programs should read this manual. This group may include registrars, administrative staff in the registrars office, advisors, admissions office personnel, deans, and department chairs.

What This Manual Covers

This manual provides instruction for using Colleague Student Degree Audit to define new academic programs, create custom programs, and track a student's academic progress.

How This Manual Is Organized

The “Introduction,” part which you are reading now, provides information about this manual and its organization, and an overview of Degree Audit and where it fits in Colleague.

The “Academic Programs” part provides procedures for defining new academic programs and requirements. Included are procedures for the following:

- Defining an academic program.
- Creating standard requirements for academic programs.
- Defining subrequirements.

The “Custom Programs” part provides procedures for creating custom programs and granting exceptions. Included are procedures for the following:

- Designing a custom academic program.
- Adding standard or custom requirements to an academic program.
- Granting exceptions at the program, requirement, subrequirement, and group levels.

The “Student Advising” part provides procedures for evaluating a student’s academic progress. Included are procedures for the following:

- Overriding Colleague’s application of academic credit.
- Performing “what if” analysis.
- Running an academic evaluation.

The Appendices part contains the following appendix:

- “Understanding Degree Audit Syntax” which provides a list of the phrases necessary to write specifications. It also includes procedures for building a group.

Where to Find More Information

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

Table 1: Sources of Information for Using Degree Audit

Topic	Reference
Detailed information about each form and field in Degree Audit.	Online help
Instructions for performing basic functions (such as accessing forms, entering data, and accessing online help) using each of the available Colleague interfaces.	<i>Guide to User Interfaces</i>
Procedures for using modules that interface with Degree Audit.	Other procedural manuals: <ul style="list-style-type: none"> • <i>Using Academic Records</i> • <i>Using Curriculum Management</i> • <i>Using Demographics</i> • <i>Using Recruitment/Admissions Management</i> • <i>Using Registration</i>
Information about installing and setting up WebAdvisor and WebAdvisor workflows.	<i>WebAdvisor Installation and Administration</i>
In-person instruction for using Degree Audit.	Training classes offered by Datatel

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

Table 2: Additional Sources of Information

Topic	Reference
Planning your implementation of Degree Audit.	Contact your Business Advisor
Installing the Colleague software.	Installation procedures for your Colleague release level
Setting up Degree Audit codes and parameters.	<i>Getting Started with Colleague Student</i>

Table 2: Additional Sources of Information (cont'd)

Topic	Reference
Detailed information on each Colleague subroutine, file, field, form, procedure, validation code, list specification, and batch process.	Technical documentation available on the Documentation pages of the website.
Changes and enhancements to the system since the previous release.	Release Highlights for your Colleague release level.
Known Issues	AnswerNet

Typographical Conventions

The following presentation conventions are used in this book to help you identify important information quickly and easily.

Table 3 illustrates the typographical styles used in this book, and explains their significance.

Table 3: Typographical Conventions Used in This Manual

Style	Type of Information	Examples
bold	Items that you can select, such as menu items, buttons, or other options that appear on the screen.	On the File menu, point to New , and then click Folder . Select 100% from the drop-down list box for the Zoom field. Click Cancel to return to the previous form.
bold Courier	Text that you must type exactly as shown.	Type the following at the operating system prompt: <code>cd /deptdir/mydir</code>
	Specific entries that you make in a field, typically by typing one or more of the letters in the entry.	In the Update Mode field, enter Yes . (Note that to enter "Yes" in a field, you normally need to type just the letter Y .)
italic	Text that can vary, depending on the specific item or record involved. Note that the text might also be <i>italic courier</i> if it is part of a message displayed on your screen, or <i>italic bold courier</i> if it is something that you must type, substituting your own value for the italicized word or words.	Type <i>dictname</i> _SQL, where <i>dictname</i> is the name of the dictionary. If the system displays the message <i>PersonID Not Found</i> , proceed to Step 4 to create a new Person record.

Important Notices

Particularly important information is emphasized in the following types of notices.

Alerts

Alerts call attention to critical information for users. For example, Alerts are used to warn you of situations where data loss or corruption could occur if certain actions are performed incorrectly. An example is shown below.



ALERT! Be extremely cautious not to delete the VOC; this will cause serious damage to your data.

Notes

Notes provide special additional information that you might want to know, or that might help you perform a task. An example is shown below.



Note: Colleague uses the Account Type information to determine the default path prompts.

Technical Tips

Technical tips provide details that might help system administrators or power users. Examples include explanations of behind-the-scenes processing, lists of file names, and names of validation code tables. An example is shown below.



Technical Tip: The stylesheet print server will create a temporary file in the *printdata* directory (within the stylesheet print server directory) to hold a print job. This file will then be parsed into 2MB files in order to be sent to the printer. Be aware that the initial file may become very large, depending on the size of the print job. Make sure you have ample available drive space when using stylesheet printing.

About Degree Audit

In This Chapter

Degree Audit is a part of the Enrollment Management component of Colleague Student. Degree Audit improves your institution's advisory services to students, ensures students stay on track in their efforts toward graduation, and facilitates review of alternate degree programs. This chapter provides the following:

- A summary of the features of Degree Audit.
- A description of the interfaces between Degree Audit and other areas in Colleague.
- Information about accessing Degree Audit.

About Degree Audit

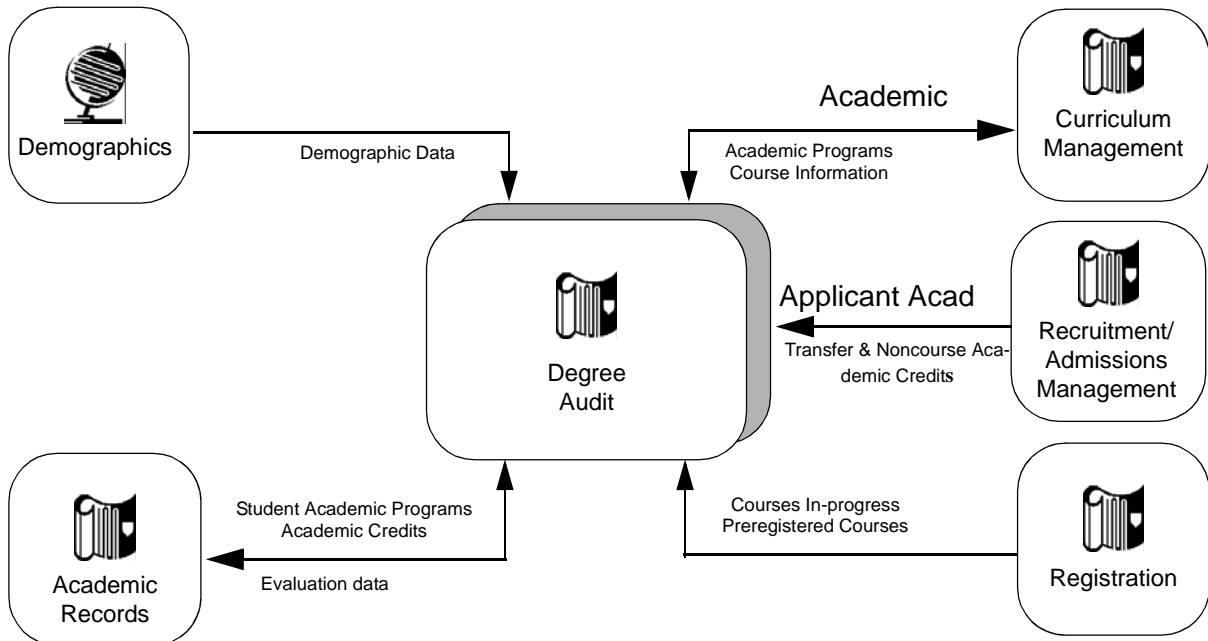
Degree Audit improves your institution's advisory services to students, ensures that students stay on track in their efforts toward graduation, and facilitates review of alternate degree programs. With Degree Audit, you can:

- Provide up-to-date information on a student's academic progress in the student's general course of study, including or not including work in stages of completion from planning to completed.
- Provide up-to-date information on specialized programs, including credits completed and grades earned, graduation requirements, cumulative GPA and major GPA, completed requirements, and exceptions granted by academic departments.
- Track a student's progress toward completion of multiple academic programs.
- Update a student's academic records automatically following a change in program.
- Update a student's permanent record automatically when degree requirements have been met.

Interfaces with Other Areas in Colleague

Figure 1 shows the other areas of Colleague that interfaces with Degree Audit, along with the information that flows to an from Degree Audit. These interfaces are described in detail with the related procedures in this manual.

Figure 1: Degree Audit and Colleague



Degree Audit also interfaces with WebAdvisor. Courses planned in the Student Educational Planning and the Student Course Planning optional modules can be included when running program evaluations. For further information, see the *WebAdvisor Installation and Administration* manual.

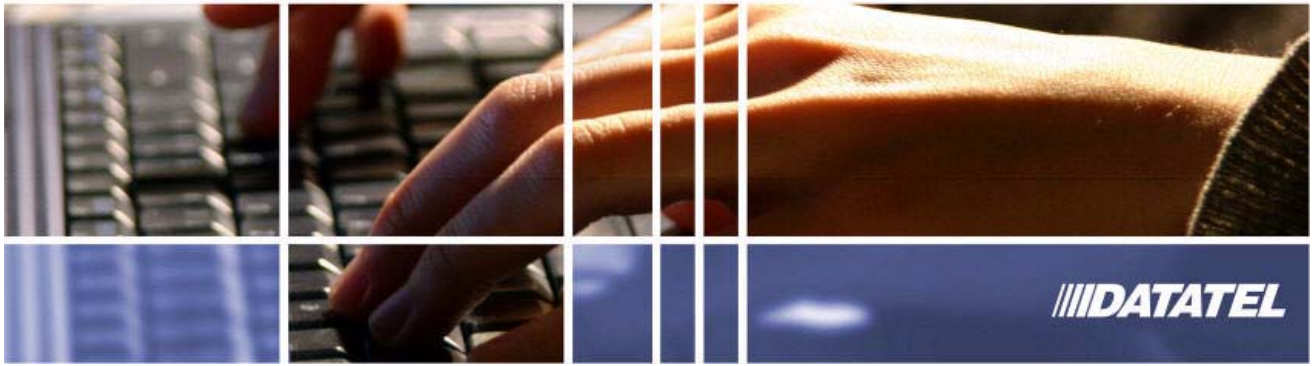
Accessing Colleague and Degree Audit

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 Degree Audit. See the *Guide to User Interfaces* manual 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 Degree Audit

Academic Programs

Defining a New Academic Program

In This Chapter

This chapter provides the procedures for defining an academic program, including defining the course requirements and non-coursework requirements. [Table 4](#) lists the topics covered in this chapter.

Table 4: Topics in This Chapter

Topic	Page
Understanding Academic Programs	27
Defining an Academic Program	28
Associating Requirements with a Program	29
Academic Requirement Hierarchical Structure	30
Options	31
Defaults	32
Compounding	33

Before You Begin

[Table 5](#) lists the items that you must define before creating an academic program.

Table 5: Information Needed Before You Define an Academic Program

Action	Reference
Set up the CCD codes	<i>Getting Started with Colleague Student</i>
Set up the Degree codes	
Set up the Locations codes	
Set up the Majors codes	
Set up the Minors codes	
Set up the Program Status codes	
Set up the Specializations codes	
Set up the Transcript Grouping codes	
Set up Academic Evaluation defaults	
Set up the Degree Audit Synonyms	



Note: How you define your academic programs will greatly impact the format of your academic evaluations. Prior to actually defining all of your academic programs, your institution should become familiar with the layout of the academic evaluation, and understand the visual implications of how you define your program requirements and subrequirements. Refer to [Running the Evaluation beginning on page 98](#) for an explanation of how an academic evaluation is formatted.

Understanding Academic Programs

An academic program is a course of study designed by your institution. The program gathers numerous attributes of a student's profile together under one "umbrella." These attributes, such as degrees, majors, minors, and academic levels, are linked to the student when the student is assigned to a program. For example, a student assigned to the BS.BIOLOGY program automatically inherits the characteristics of that program, identifying that student as an undergraduate student seeking a Bachelor of Science degree, majoring in biology. Other examples of academic programs include a Bachelor of Arts in History or a self-improvement program. A student's entire profile will change if he switches to a different program.

An academic program does not have to result in a degree, although you can use it as a way to measure an individual's progress toward completion of that program. A student must complete these requirements, which can be a combination of coursework and noncourse work, to finish the academic program. You can use Degree Audit to produce system-generated evaluations of the student's progress in the program.



Note: Students and advisors can also use WebAdvisor to view and print program evaluations. For further information, see the *WebAdvisor for Colleague Student* manual.

A program is associated with one or more catalogs that identify the periods (typically, academic years) when the program is offered.

A 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 a student chooses a particular academic program, that student inherits the attributes you defined for that program. This academic program can later be modified, customized, or withdrawn.

You create standard academic programs that you assign to any student, or you can create custom programs for individual students. 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, assigning it to all students. Students can then work with their advisors to add custom requirements to their programs. You can customize a student's program by adding components such as an additional major or minor. See [Creating a Custom Program beginning on page 57](#) for more information about customizing a student's program.

Defining an Academic Program

Use the Academic Programs (PROG) form to define an academic program. You use the PROG form to define virtually everything about an academic program except the academic requirements, which you define on the Academic Program Requirements (APRS) form. You can access the APRS form from the PROG form. From a degree audit perspective, you should think of an academic program as consisting of two parts: the administrative part (recorded on the PROG form) and the academic requirements (recorded on the APRS form).

Figure 2: The Academic Programs (PROG) Form

PROG-Academic Programs

Program: BS.BIOCHEM

Title: Bachelor of Science in Biochemistry

Desc: 1

Status: A Active | Status Dt: 07/10/97 | Appr Agency: | Appr Person: Mrs. Kelly Tucker | Appr Dt: 07/10/97

Department: 1 CHEM Chemistry Department | Division: HU | School: NURS

Catalogs: 1 2006 2006 Catalog | Stu Select: No

Start/End Dt: 07/10/97 | Accred Exp:

Degree: BS Bachelor of Science

CCDs: 1

Majors: 1 BIOL BIOLOGY

Minors: 1

Specs: 1

Academic Level: UG Undergraduate

Grade Scheme: UG Undergraduate Grade Schem

National ID: 26.0202 Biochemistry

Local IDs: 1

Locations: 1

Tran Group: UG St

Types: 1 G Gene

Mths to Cmpl: 48

Allow Grad: Yes

Create Appl: No

Addnl Info: X

For more detailed information about using the PROG form to define the administrative aspects of an academic program, see the *Using Curriculum Management* manual.

Associating Requirements with a Program

Academic requirements are the building blocks of academic programs. Each academic requirement stands alone and can be associated to multiple academic programs. Use the Academic Program Requirements (APRS) form to associate academic requirements to an academic program. Depending on your workflow, you can access the APRS form from the Addnl Info field on the PROG form or directly from the menu. For more information about defining requirements, see [Understanding Requirements on page 37](#).

Figure 3: The Academic Program Requirements (APRS) Form

APRS-Academic Program Requirements

Acad Program: BS.BIOCHEM 2006 Bachelor of Science in Biochemistry

Overall Institutional

Minimum Credits 120.00 60.00

Minimum GPA 2.000 2.000

Grade Scheme UG Undergraduate Grade Scheme

Minimum Grade

Other Grades 1 P 2 AU 3

Transcript Grouping UG Standard Undergraduate

Activity Eligibility Rules 1

Requirement	Title	Type
1 SAQBIO	Biology Requirement	MAJ M
2 UGGENED	Undergraduate General Education	GEN G
3		
4		
5		

Curriculum Track

Maximum Credits

Duration Hours

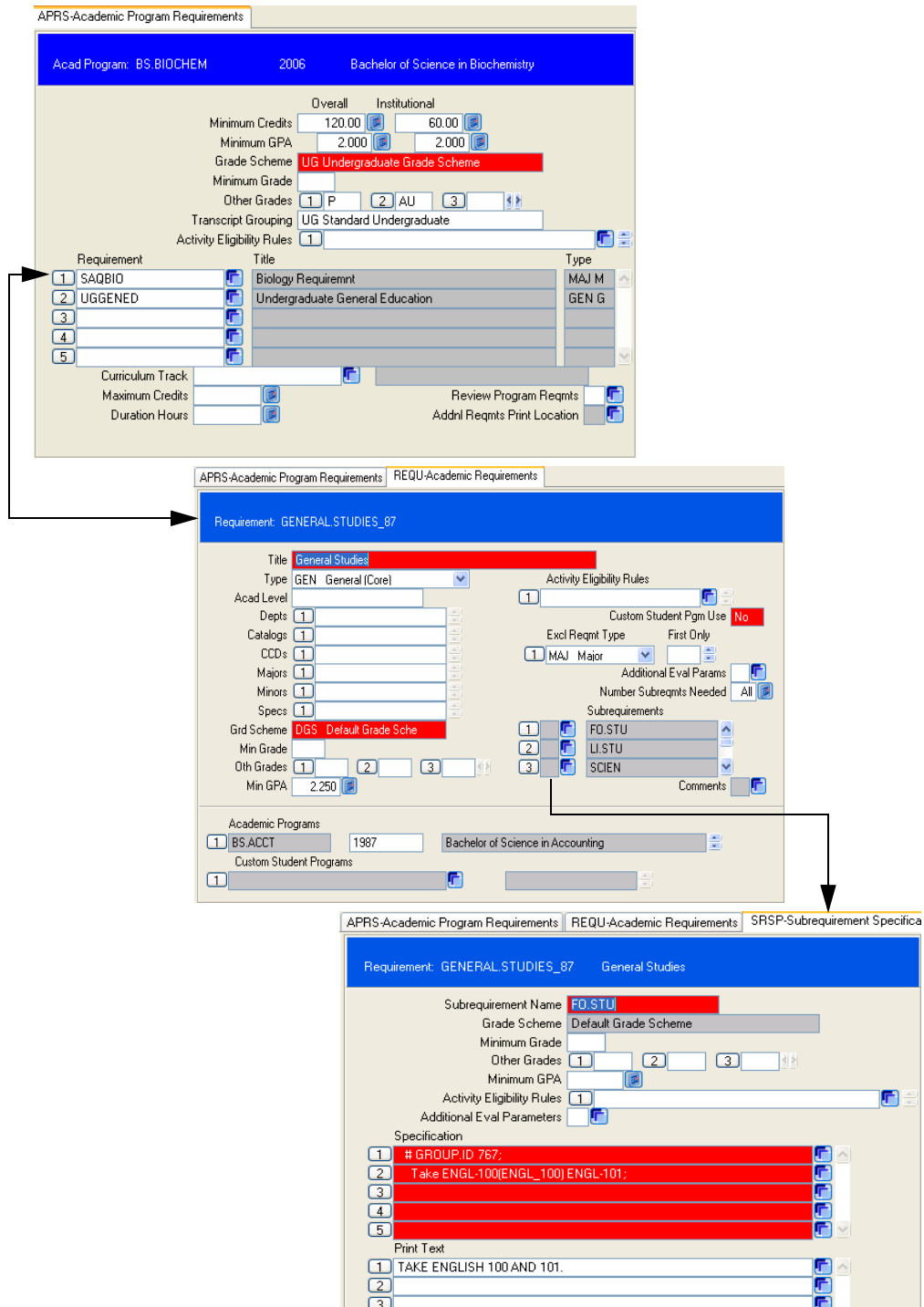
Review Program Reqmts

Addnl Reqmts Print Location

Note that the catalog name (2006) is displayed in the header of the APRS form shown in Figure 3. Unlike the PROG form, which prompts only for a program, the APRS form prompts for both program and catalog. The information that you enter on the APRS form is associated with a specific catalog version of the program. Each catalog version of a program can have its own set of academic requirements. You can vary the academic requirements of an academic program from one catalog to the next. If you change the specifications of any requirements in a program, you may need to change the requirements of more than one version of the program.

Academic Requirement Hierarchical Structure

Figure 4: Multiple Levels of an Academic Requirement Specification



The academic requirements of an academic program are specified in a hierarchical structure consisting of Program, Requirement, Subrequirement, and Group, with the Program referred to as the highest level, and the Group as the lowest level. This structure is evident in the forms illustrated in [Figure 4 on page 30](#).

Academic Program. An academic program requirement (specified on the Academic Program Requirements [APRS] form) is composed of one or more academic requirements.

Academic Requirement. An academic requirement (specified on the Academic Requirements [REQU] form) is composed of one or more subrequirements.

Subrequirement. A subrequirement (specified on the Subrequirement Specifications [SRSP] form) is composed of one or more groups.

Group. A group (specified in Degree Audit syntax in the Specification field on the SRSP form) is the fundamental or basic unit of an academic requirement specification. Three examples of a group are:

1. # TAKE MATH*100; MINIMUM GRADE C
2. # TAKE 12 CREDITS; FROM DEPARTMENTS CHEM, BIOL
3. # TAKE 1 COURSE; FROM ART*101, ART*102, ART*103



Note: In the course planning wizard in WebAdvisor, a group is called a *component*.

Options

There are several different ways for students to meet a requirement. You can provide options at various levels to students, including:

1. **At the requirement level.** You can specify that the student must only select some of the specified subrequirements in the Number Subreqmts Needed field of the Academic Requirements (REQU) form.
2. **At the subrequirement level.** You can enter a “Take” phrase in the Specifications field of the SRSP form to specify that the student only needs to select some of the specified groups.
3. **At the group level.** You can create a group that provides the student with options. For example:
TAKE 2 COURSES; FROM MATH*100, MATH*102, MATH 200...

Defaults

Some elements appear at more than one level and behave as defaults. They exhibit the following properties:

- If not specified at a particular level, they take their value from the next higher level.
- If specified at any level, that specification overrides any specification made at a higher level.

The elements that behave as defaults are listed below:

Minimum Grade. You can specify the minimum grade at the group level (using a “minimum grade” phrase inside the Specification field on the Subrequirement Specifications [SRSP] form), the subrequirement level (on the SRSP form), the requirement level (on the REQU form), and at the program level (on the APRS form). Colleague looks for a minimum grade specification at the lowest level (first group, then subrequirement, requirement, and program). If one exists, Colleague also uses the “other grades” (exceptions to the minimum grade, such as Pass grade) specified at the same level.

Excluded Requirements. You can specify exclusion rules at the group level (using a phrase in the Specification field on the SRSP form) and at the requirements level (on the REQU form). Colleague checks for specifications at the lowest level and works its way up the hierarchy.

Additional Evaluation Parameters. You can specify these complex (but rarely needed) parameters at the group level (in the Specification field on the SRSP form), at the subrequirement level (on the SRSP form), at the requirement level (on the REQU form), and at the system level (on the Academic Evaluation Defaults [AEDF] form). Colleague checks for specifications at the lowest level and works its way up the hierarchy.

Compounding

Unlike default data that override all higher level specifications, some data dealing with selection criteria compound from one level to another. They add their restriction to the restrictions specified at all other levels. Thus, in order for a specific course in the student's academic record to be applied to a given group's TAKE phrase, it must pass *all* of the criteria listed in [Table 6](#).

Table 6: Selection Criteria to Check Before Applying TAKE Phase

Criteria to Check	Description
Group (component)	Selection Phrases. An item must pass any FROM or EXCEPT phrases specified for the group.
Subrequirement	Eligibility Rules. If any rules are specified on the SRSP form, the item must pass all rules that can be evaluated.
Requirement	Eligibility Rules. If any rules are specified on the REQU form, the item must pass all rules that can be evaluated.
Program	<p>Eligibility Rules. If any rules are specified on the APRS form, the item must pass all rules that can be evaluated.</p> <p>Transcript Grouping. You determine the primary selection of a student's academic activity using the Transcript Grouping field on the APRS form. Only items selected by that grouping will appear on the evaluation report.</p>

Rules can use a primary file view of STUDENT.ACAD.CRED or COURSES. If activity eligibility rules are specified, the item must pass all rules that can be evaluated. A rule using the COURSES file can be used to evaluate either a planned course or coursework that is in-progress or complete. However, a rule using the STUDENT.ACAD.CRED file cannot be used to evaluate a planned course (because a planned course has no STUDENT.ACAD.CRED record). This means that any of your rules that use the STUDENT.ACAD.CRED file will not be used in evaluating a planned course.

Therefore, Datatel strongly recommends that rules use COURSES as the primary file view if your institution uses any of the following in WebAdvisor:

- Student Educational Planning
- Student Course Planning
- Smart Registration



ALERT! Running rules against all your courses when using the course planning wizard may cause WebAdvisor to time out. The rule evaluation will run much faster if you write a subroutine to use when evaluating these rules. For more information, see the *Getting Started with Colleague Student* manual.

Procedures for Defining an Academic Program

Use the Academic Programs (PROG) form to define the administrative portion of an academic program. Use the Academic Program Requirements (APRS) form to associate academic requirements to an academic program. Refer to [Understanding Academic Programs on page 27](#) and online help for information about the fields on the PROG form.

Table 7: Additional Workflow from the Academic Programs (PROG) form

If you want to ...	Access this form ...	From this field
Restrict CCDs, majors, minors, and specializations that can be added to the program to customize the program for a student	Program Addnl Restrictions (PRAR) form	Addnl Info
Restrict the students eligible for the program	Academic Eligibility Rules (ADMR) form	
Associate honors and the rules for achieving honors	Graduate Honors Rules (GHRL) form	
Associate requirements to the program	Academic Program Requirements (APRS) form	



Note: Think of the PROG form as the form that defines the administrative aspects of a program, and the APRS form as the form that defines the Degree Audit constituents (the academic requirements) of the program. The program *must* exist before you can associate requirements to it.

Defining Requirements

In This Chapter

This chapter describes how to define requirements for an academic program. [Table 8](#) lists the topics covered in this chapter.

Table 8: Topics in This Chapter

Topic	Page
Understanding Requirements	37
Creating a Standard Requirement	39
Associating Requirements to a Standard Academic Program	44
Understanding Subrequirements and Groups	46
Defining Subrequirements and Groups	48

Before You Begin

Table 9 lists the items that you must define before creating requirements.

Table 9: Information Needed Before You Define Requirements

Information Needed	Reference
Set up the Academic Requirement Type codes	<i>Getting Started with Colleague Student</i>
Set up the CCD codes	
Set up the Department codes	
Set up the Majors codes	
Set up the Minors codes	
Set up the Specializations codes	
Set up the Subject codes	
Define course work	<i>Using Curriculum Management</i>
Define course equivalents	



Note: As you define requirements, pay careful attention to the appearance of your evaluation to ensure that they are meaningful and easy to understand.

Understanding Requirements

A *requirement* is a specification of academic work required of a student. Requirements are the building blocks of academic programs. You can create two types of requirements: a standard requirement, which is available to all programs, or a custom requirement, which you create specifically for an individual's program. This chapter outlines the procedures for building standard requirements.

Naming Requirements

You should name academic requirements to incorporate some version information, such as the year it was defined. By using your version standards in the requirement name, you can more easily distinguish between the different versions of the requirement. For example, when you create an undergraduate core requirement 2009, you could name the requirement "UG.CORE.REQMT.09."

Your naming convention does not affect a requirement's usage. Depending on your institution's policies, you can combine requirements from different years to build a program. For example, you can use the core requirements you set up in 2008 along with the chemistry major requirement you created in 2009.

The naming convention does not in any way restrict the requirement to programs of a particular catalog. For example, the UG.CORE.REQMT.09 (core requirement for undergraduates) might very well be referenced by every undergraduate program listed in both the 2008 and 2009 catalogs. This occurs if the requirement did not change from 2008 to 2009. This also implies that a program can mix requirements from different catalogs. For example, if the 2009 BS.CHEMISTRY program listed the following requirements:

- UG.CHEM.MAJOR.08
- UG.CORE.REQMT.09

then you know that the undergraduate core requirement had changed from the previous year, but the chemistry major requirement had not changed for 2009.

Possible Workflows

You can create academic requirements using one of two workflows. You can create requirements before you create academic programs. If you use this workflow, you will have a selection of “building blocks” to use when you create academic programs.

You also can create academic requirements as you create academic programs, accessing the key forms from the Academic Program Requirements (APRS) form.

In practice, you will probably end up combining the workflows. For example, after you create a core requirement for one program, it will exist for you to use in another academic program.

Creating a Standard Requirement

A standard academic requirement is a requirement that can be used by multiple academic programs. For example, you may have a core requirement shared by many or all academic programs. You may also have a math major type requirement used by all academic programs that have math as a major.

Use the Academic Requirements (REQU) form to define a standard academic requirement.

Figure 5: The Academic Requirements (REQU) Form

The screenshot shows the 'REQU-Academic Requirements' form for a requirement named 'ACCOUNTINGCC'. The form is divided into several sections:

- Title:** One Course Requirement
- Type:** MAJ Major
- Acad Level:** UG Undergraduate
- Depts:** 1 ACCT Accounting Depa
- Catalogs:** 1 1997 1997-1998 Catal
- CCDs:** 1 GIFT Gifted/Talented
- Majors:** 1 ACCT Accounting
- Minors:** 1
- Specs:** 1
- Grid Scheme:** CAT Test Grade Scheme
- Min Grade:** B
- Oth Grades:** 1, 2, 3
- Min GPA:** 3.000
- Activity Eligibility Rules:** 1
- Custom Student Pgm Use:** Yes
- Excl Reqmt Type:** First Only
- Additional Eval Params:** All
- Number Subreqmts Needed:** All
- Subrequirements:** 1 one course, 2 Another Course, 3
- Comments:**
- Academic Programs:** 1 ACCOUNTING, 1997, Bachelor of Science in Accounting
- Custom Student Programs:** 1

A label 'Requirement Usage' with a line pointing to the 'Academic Programs' section.

Fields Used for Reporting Purposes

The data you enter in the Acad Level, Depts, Catalogs, CCDs, Majors, Minors, and Specializations fields is for reporting or querying purposes only and is not used by the degree audit evaluator. The data in these fields do not in any way restrict how or where the requirement may be used. For example, a requirement with an entry of “UG” (undergraduate) in the Acad Level field may be referenced in any program, including those that are not undergraduate programs.

Similarly, these data fields do not define the characteristics of the program or the students to whom the program is assigned. For example, if you mark this requirement as associated with major “ACCOUNTING” and use the requirement in a specific program, and assign that program to John Smith, it does not necessarily make John Smith an accounting major. The program’s profile (and the profile of the students to whom it is assigned) is defined on the PROG form, not on the REQU form.

Noteworthy Fields on the REQU Form

The fields described in this section are particularly important when creating and modifying academic requirements. See online help for additional information about fields on this form.

Type

You must enter the requirement type in the Type field. The requirement type code serves two purposes.

The type code identifies the requirement’s evaluation priority. (You can define requirement type’s evaluation priority on the ACAD.REQMT.TYPES validation code table using the VAL form.) When the system evaluates a program with multiple requirements, it uses this priority to determine in what order to evaluate the requirements.

The type code identifies the requirement as being of a certain type. This type may then be referenced in the specification of exclusion logic. Exclusion logic is specified in the excluded requirement types field (Excl Reqmt Type field). Refer to that field’s online help for more details.

Even if you are not using the excluded requirement types functionality, you should still classify your requirements in a way that makes sense to your institution. This may help you to group them for reporting purposes.

Subrequirements

Every requirement must have at least one subrequirement. It is within the detail of the subrequirement that you specify which course the student actually needs to take. You can detail to the Subrequirements Specifications

(SRSP) form to view the subrequirement or add a new one. For more information about subrequirements, see “[Understanding Subrequirements and Groups on page 46](#)”.

Programs that Use the Requirement

The bottom section of the REQU form lists the standard and custom academic programs that use the requirement. You can view detailed information about the custom academic program by detailing to the Pgm Customization/Evaluation (PGEC) form. Any changes you make to the requirement will affect the academic programs listed in both fields, and the students assigned to the programs.

After you associate a requirement with academic programs, those programs are listed in the Academic Programs field. The custom academic programs associated with the requirement are listed in the Custom Programs field. You can detail on a custom academic program listing to view detailed information about the program. If you make changes to the requirement, each standard and custom academic program listed will be affected by the changes.

The Academic Programs field and the Custom Student Programs field give you some idea of how many programs will be affected by any changes you make to the requirement. The Academic Programs and the Custom Student Programs fields (in the Requirement Usages area of the form) are inquiry-only.

Procedure for Creating a Requirement

Follow the steps below to create a requirement.

- Step 1.** Access the Academic Requirements (REQU) form.
- Step 2.** At the Academic Requirements LookUp prompt, enter the ID you want to use to identify the new requirement.
- Step 3.** Select **Add** to create the new requirement.

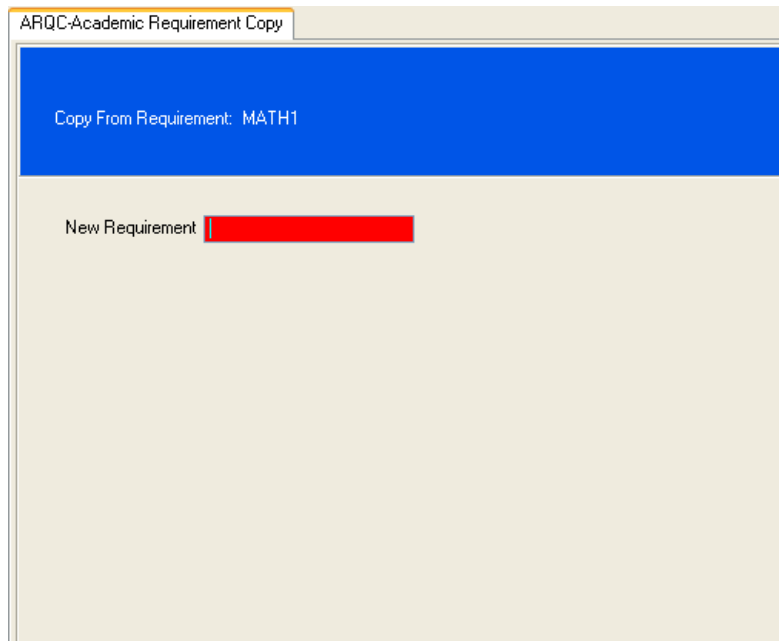
- Step 4.** In the Title field, enter a brief description of the requirement to identify the requirement.
- Step 5.** In the Type field, select the codes that identify the requirement and the requirement's evaluation priority.
- Step 6.** In the Grade Scheme field, enter the grading scheme that specifies the minimum grades needed for this requirement.
- Step 7.** To specify additional details about who must meet the requirement, use the Depts, Catalogs, CCDs, Majors, Minors, and Activity Eligibility Rules fields.
- Step 8.** Save your entries on the REQU form.

Creating a Requirement by Copying an Existing Requirement

Use the Academic Requirement Copy (ARQC) form to create a new requirement by copying an existing requirement. The new requirement will have subrequirements specified exactly like the original requirement; however, it will not be linked to any programs.

Figure 6 shows an example of the ARQC form.

Figure 6: The Academic Requirement Copy (ARQC) Form



ARQC-Academic Requirement Copy

Copy From Requirement: MATH1

New Requirement

Enter the academic requirement you want to copy at the Academic Requirements LookUp prompt. Then enter a name for the new requirement in the New Requirement field.



Note: The name of the new requirement cannot contain spaces.

Collegia then opens the new record on the Academic Requirements (REQU) form where you can modify information for the new requirement.

Associating Requirements to a Standard Academic Program

You can list the requirements that define the program on the Academic Program Requirements (APRS) form. You can access the APRS form from the menu, or by detailing from the DA Reqmts field on the Academic Programs (PROG) form.

Figure 7: Example of the REQU Form Accessed from the APRS Form

The figure shows two screenshots of a web-based form. The top screenshot is the 'APRS-Academic Program Requirements' form for the 'Acad Program: BS.BIOCHEM' (2006 Bachelor of Science in Biochemistry). It includes fields for 'Overall' and 'Institutional' requirements: Minimum Credits (120.00 Overall, 60.00 Institutional), Minimum GPA (2.000), Grade Scheme (UG Undergraduate Grade Scheme), Minimum Grade, Other Grades (1 P, 2 AU, 3), Transcript Grouping (UG Standard Undergraduate), and Activity Eligibility Rules (1). A table lists requirements: 1 SAQBIO (Biology Requirement, MAJ M), 2 UGGENED (Undergraduate General Education, GEN G), and 3, 4, 5 (empty). The bottom screenshot is the 'REQU-Academic Requirements' form for 'Requirement: GENERAL.STUDIES_87'. It shows details for 'General Studies' (Type: GEN General (Core), Activity Eligibility Rules: 1, Custom Student Pgm Use: No, Excl Reqmt Type: MAJ Major, Additional Eval Params, Number Subreqmts Needed: All, Subrequirements: 1 FO.STU, 2 LI.STU, 3 SCIEN, Min GPA: 2.250). It also lists 'Academic Programs' (1 BS.ACCT 1987 Bachelor of Science in Accounting) and 'Custom Student Programs' (1).

Use the top section of the APRS form to define the elements of an academic program needed to perform a degree audit evaluation. You can define the minimum overall and institutional GPA and number of credits, and the grade scheme and transcript grouping for the program. Use the Institutional column to define the minimum GPA and number of credits that must be achieved for all course work completed at your institution. You can use the Overall column to define the minimum GPA and number of credits for all academic credits combined.

You can list existing requirements which make up the program in the Requirements field, or you can detail to the Academic Requirements (REQU) form to create a new requirement (see Figure 7). The requirements will be printed on the evaluation report in the same order as you entered them in the Requirements field, however, they will not necessarily be evaluated in this order. The order of evaluation is determined by the setup of the Academic Requirement Types validation table. For more information about setting up the validation table, see the *Getting Started with Colleague Student* manual.

Setting the Print Location for Additional Requirements

On an evaluation, the requirements are printed (on the screen or on paper) in the same order you listed them on the Academic Program Requirements (APRS) form. If you customize this program for a student by adding additional requirements, then the system will print those additional requirements at the end of the evaluation, unless you access the Addnl Reqmts Print Location (ADPL) form and specify where those additional (custom) requirements should be inserted into the print sequence. You can access the ADPL form by detailing from the Addnl Reqmts Print Location field.

Understanding Subrequirements and Groups

A subrequirement is a component of a requirement, expressed in terms of course work or credits that the student must complete. Each requirement must include *at least* one subrequirement. In the same way, a group is a component of a subrequirement.

In a subrequirement you can indicate how many groups must be taken, the minimum required grade, the minimum required GPA, and activity eligibility rules.

In a group you describe the course work or credits that the student must complete, in academic requirement specification (Degree Audit) syntax. For example, the following three items are subrequirements each having a single group:

“Take 4 credits; From Department BIO”

“Take ENGL-100, ENGL-110, ENGL-120”

“Take 2 courses; from ART-100, ART-200, ART-222, ART-228”

This syntax defines two groups within a subrequirement:

Take 5 courses of CHEM

Take 15 credits of BIO”

Unlike requirements that can be used by multiple programs and are independent of programs, subrequirements are associated with only one requirement. You cannot create a stand-alone subrequirement and associate it with multiple requirements. You may, however, create a requirement by copying an existing requirement. The new requirement will have subrequirements exactly as specified in the copied requirement. For more information about copying requirements, see “[Creating a Requirement by Copying an Existing Requirement on page 43](#)”.

[Table 10 on page 47](#) list examples of how you would set up subrequirements and groups based on your institutions course catalog.

Table 10: Sample Catalog Listing and Requirement Specifications

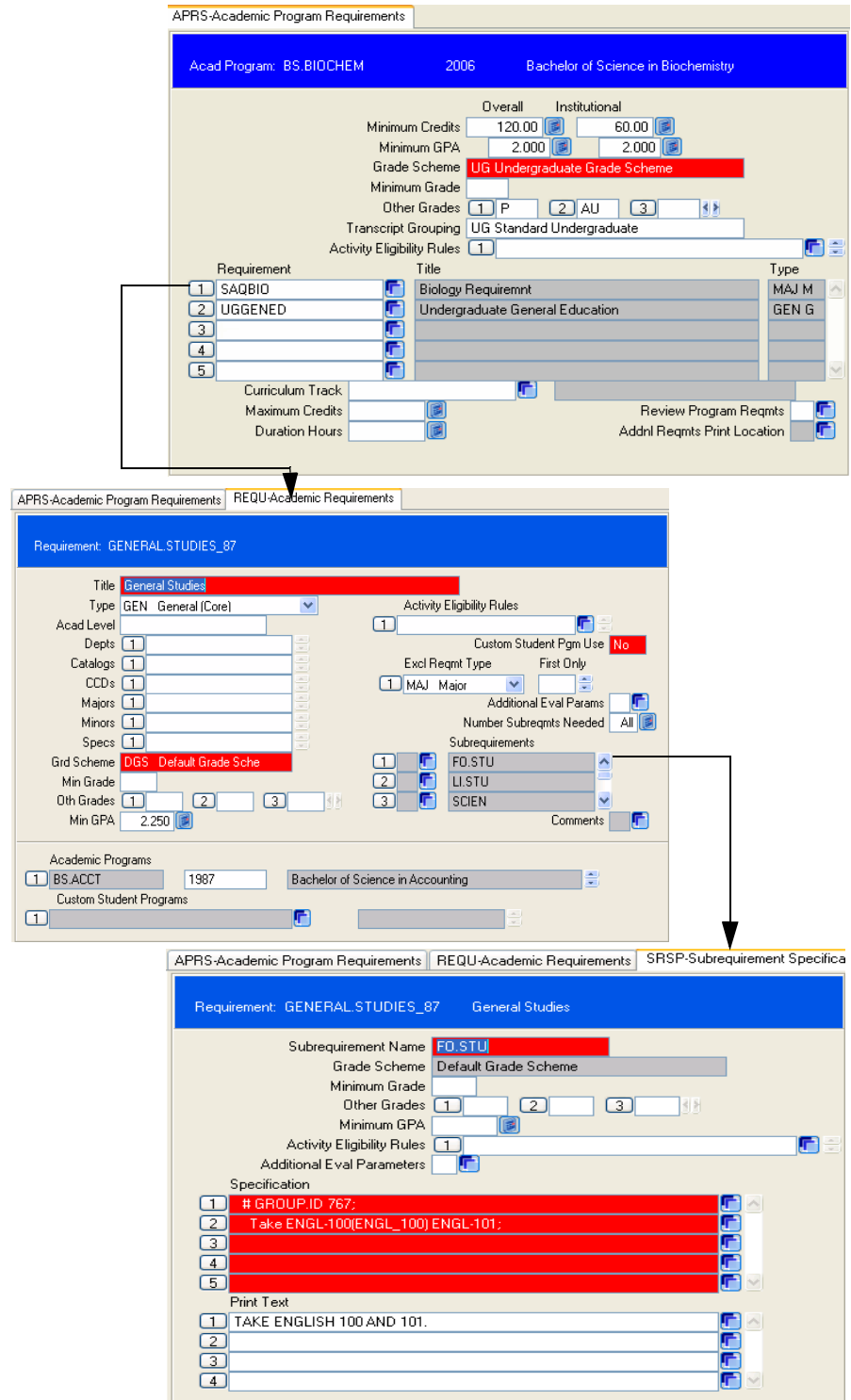
Catalog Listing	Sample	Level
Select two courses from History or Geography, except History 101 and History 103	TAKE 2 COURSES; FROM DEPTS OF HIST AND GEOG; EXCEPT HIST*101 AND HIST*103	Group
Take English 101 and 102	ENGL*101 ENGL*102 or ENGL*101 AND ENGL*102 or ENGL*101, ENGL*102 or TAKE ENGL*101 AND ENGL*102	Group
One course from Philosophy	TAKE 1 COURSE FROM THE DEPT OF PHILOSOPHY	Subreq
Take three courses from three of the following departments: Drama, Music, Art, Literature	TAKE 3 GROUPS: #1 COURSE FROM DRAMA DEPT #1 COURSE FROM MUSIC DEPT #1 COURSE FROM ART DEPT #1 COURSE FROM LIT DEPT	Group Group Group Group
Four courses from at least two of the following departments: <ul style="list-style-type: none"> • Engl • Math • Hist • Soc 	4 COURSES FROM DEPTS OF ENGL, MATH, HIST, SOC; MINIMUM 2 DEPARTMENTS	Group
English 101, 102, 103 with a grade of "C" or better	ENGL*101, ENGL*102, ENGL*103; MINIMUM GRADE C	Group

Defining Subrequirements and Groups

You can define a subrequirement from the requirement record. Use the Subrequirement Specifications (SRSP) form to define a subrequirement. You can access the SRSP form by detailing from the Subrequirements field on the Academic Requirements (REQU) form (Figure 8) You can define groups from the Specifications field on the Subrequirement Specifications (SRSP) form.

You may want to review how requirements, subrequirements, and groups relate to each other. See [Academic Requirement Hierarchical Structure on page 30](#), [Options on page 31](#), [Defaults on page 32](#), and [Compounding on page 33](#) for a detailed information.

Figure 8: Relationship Between the APRS, the REQU, and the SRSP Forms



Specifying the Subrequirement and Groups

Use the Specification field to write the subrequirement and group specifications. *You must use the academic requirement specification (Degree Audit) syntax (keywords or synonyms) you defined when you set up Degree Audit.* For more information about academic requirement specification (Degree Audit) syntax, see [Degree Audit Syntax beginning on page 137](#).

You specify an academic program's academic requirements at several different levels: the program level, the requirement level, the subrequirement level, and the group level. An academic program consists of one or more requirements; a requirement consists of one or more subrequirements; a subrequirement consists of one or more groups.



Note: In the course planning wizard in WebAdvisor, a group is called a component.

You may provide up to three different levels of options to a student: the requirement level, the subrequirement level, and the group level. For example, you may specify a requirement such that the student is required only to complete a certain number (not all) of the listed subrequirements. Similarly, you can specify a subrequirement such that the student is required to select only some of the listed groups. Finally, you can provide options to the student at the group level, for example, TAKE 2 COURSES; FROM MATH-100, MATH-200, MATH-300.

You may want to review information about requirements and apply that information to subrequirements. See [Academic Requirement Hierarchical Structure on page 30](#), [Options on page 31](#), [Defaults on page 32](#), and [Compounding on page 33](#) for a refresher on requirements/subrequirements.

Setting Up Subrequirement Print Text

The Print Text field displays the subrequirement as it will be shown on the evaluation and in the course planning wizard (if your institution uses the Smart Registration optional module). If you are initially creating a subrequirement specification, the specification is copied to the Print Text field exactly as you entered it in the Specification field. You may override the text in the Print Text field and enter the text you want displayed to a user. See the Specification and Print Text fields on the Subrequirement Specification (SRSP) form in Figure 8.



Note: The text entered in the Print Text field is also displayed in WebAdvisor in the “What is Required” table on the Choose a Component form in the course planning wizard.

Use the Print Text field on the SRSP form to enter a general description of the *entire* subrequirement.

Setting Up Print Text for a Group

Print phrases inside the specification window provide print text for each group. (See [Degree Audit Syntax on page 137](#) for a description of all phrases.) If your institution uses Smart Registration, you should write a descriptive print phrase for each group that students and advisors will be able to understand. If your institution does not use Smart Registration, you may still want to use print phrases if you want each group to be preceded with its own description in the evaluation report.

For example, the Print Text field can contain:

“Complete the MATH/SCIENCE requirement for nonscience majors” and the Specification field may contain:

Print “Take any 2 non-remedial MATH courses”;

Take 2 courses; from DEPT MATH; except level remedial

Print “Take at least 12 credits from the physical/natural sciences division”;

Take 12 credits; from DEPT BIO, ZOO, BOTNY, CHEM, PHYS, GEOG, ASTRON



Note: If your institution is using WebAdvisor Smart Registration, you should always enter print phrases if the subrequirement contains more than one group. This text is displayed in the Component column on the Choose a Component form in the course planning wizard.

Retrieving the Subrequirement

After you save a subrequirement and retrieve it on the SRSP form, the subrequirement/group specification will *not* be redisplayed in the same language as you recorded it. Colleague does not actually store the wording of your specification; it stores the meaning. Colleague analyzes your specification and stores the meaning in its own internal tables. When you retrieve the specification on the SRSP form, the compiler rebuilds the specification wording from its stored tables.



Note: Neither the meaning of your subrequirement/group nor the printed text that appears on the evaluation has changed; only the wording of the specification.

Because Colleague stores the meaning of the specification rather than your original wording, you have the following advantages:

- Colleague shows you how it interpreted your original wording and lets you verify that it has correctly interpreted your specification.
- Your specification is immune from word changes. For example, you may record a specification as “Take MATH-100,” but Colleague stores the course’s ID (for example, 291) in its internal tables, not the words “MATH-100.” If your institution decides to change the name of “Undergraduate Introduction to College Math” from MATH-100 to MATH-110, you will not need to find all requirements that use MATH-100 and change their specifications to MATH-110. If you retrieve a subrequirement where you originally specified MATH-100, you will see that the rewording will correctly reflect the new name, “MATH-110.”

Correcting Specification Errors

After you enter the subrequirement/group specifications and leave the Specification field, the specification is compiled. If errors exist in the specification, Colleague displays the specification on a display form and points to the line containing the error. After you view the error and exit the display form, the SRSP form is displayed with the cursor on the error line. You must correct the error and recompile the specification.

Procedures for Defining Subrequirements

Follow the steps below to define a subrequirement.

Step 1. Access the requirement record on the Academic Requirements (REQU) form.

Step 2. Access the Subrequirement Specifications (SRSP) form.

You can access the SRSP form by detailing from the Subrequirements field on the REQU form.

Step 3. In the Subrequirement Name field, enter a brief description of the subrequirement.

Step 4. Enter the subrequirement/group specification (including print phrases) in degree audit syntax using the keywords provided or the synonyms you set up.

See the *Getting Started with Colleague Student* manual or [Degree Audit Syntax beginning on page 137](#) for more information.

Step 5. Enter the print text as you want it to appear on the evaluation and in WebAdvisor in the course planning wizard.

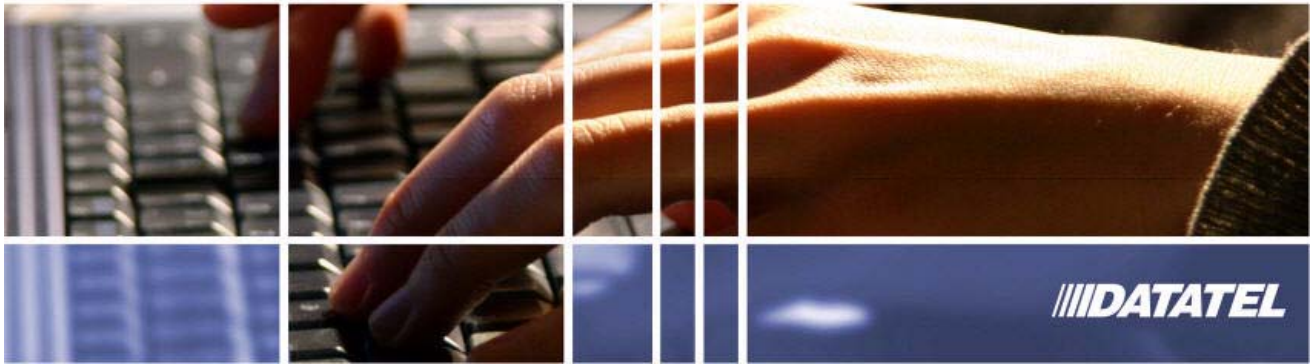
Step 6. Save the record.

Changing a Subrequirement or Group

You can change the different constituents of the subrequirement including the subrequirement name, the minimum grade, and the specification. However, you cannot change the grade scheme. The subrequirement inherits the grade scheme from the requirement with which it is associated.

Use the Subrequirement Specifications (SRSP) form to change a subrequirement and/or group. You can access the SRSP form only by detailing from the Academic Requirements (REQU) form.

Be aware that deleting an existing group or changing its GROUP.ID will nullify previously granted exceptions to that group. Also, even when its GROUP.ID is unchanged, modifying an existing group can nullify previously granted exceptions to the group, depending on the nature of the change. For example, if a group is defined with a TAKE phrase requiring a certain number of credits, then an exception to the number of credits can no longer be honored if the group's TAKE phrase is changed to require an item other than credits.



Using Degree Audit

Custom Programs

Creating a Custom Program

In This Chapter

This chapter provides information about custom academic programs and how to define them. [Table 11](#) lists the topics covered in this chapter.

Table 11: Topics in This Chapter

Topic	Page
Understanding Custom Programs	58
What is a Custom Academic Program?	58
Adding Constituents	58
Adding a Standard Requirement	59
Adding a Custom Requirement	62

Before You Begin

Before you create a custom program you should:

Table 12: Information Needed Before You Create a Custom Program

Action	Reference
Set up the CCDs	<i>Getting Started with Colleague Student</i>
Set up the majors	
Set up the minors	
Set up the specializations	
Make sure the student is assigned to a program	<i>Using Academic Records</i>

Understanding Custom Programs

What is an Academic Program?

An academic program is an established course of study with set requirements. An academic program does not necessarily result in a degree, but it does have specific requirements that establish a way to measure a person's progress toward completion of the academic program. A standard academic program is a program designed and outlined by your institution. For more information about standard academic programs and requirements, see [Understanding Academic Programs on page 27](#).

What is a Custom Academic Program?

A custom program is a program designed specifically for a student. You can create a customized program by adding requirements such as majors, minors, CCDs and specializations to a standard program, and by applying exceptions and overrides to the requirements of a program. This chapter will outline the procedures for adding constituents to a standard program to create a customized program. For information about granting exceptions, see [Understanding Exceptions on page 68](#).

Adding Constituents

You can create a custom program by adding standard and custom requirements such as majors, minors, CCDs, and specializations. The new constituent is either a standard requirement that is available to other students, or a customized requirement created specifically for this student. For more information about defining standard requirements, see [Academic Requirement Hierarchical Structure on page 30](#).

Use the PGM Evaluation/Customization (PGEC) form to add requirements to a student's program. You can access the PGEC form from the menu level, or by detailing from both the Student Academic Program (SACP) and

Applications (APPN) forms. You can assign the student to a standard program using the SACP form. For more information about assigning a student to a program and the SACP form, see the *Using Academic Records* manual.

You can assign the student to a program from the applications perspective. For more information about assigning the student to a program during the application process and the APPN form, see the *Using Recruitment/Admissions Management* manual.

Figure 9: Example of the PGM Evaluation/Customization (PGEC) Form with an Additional CCD and Minor

PGEC-Pgm Evaluation/Customization

Smith Jr., Mr. Alex L. ID: 1053475 SSN: 555-99-1212
Fairfax VA 22033

Acad Program: Bachelor of Science in Accounting
Acad Level: UG Catalog: 96-97
Degree: AA CCDs: []
Majors: MGMT BMA
Minors: []
Specs: []

Evaluate: Not Current
Last Evaluation Date: []
Last Evaluation Status: []

Customizations
Exceptions/Overrides: 0/0
Custom Title: []

	Start Dt	End Dt	Standard Reqmt	Cust
Addnl CCDs: 1 CPA	04/25/98	04/26/98	ACCOUNTINGCC	No
Addnl Majors: 1				
Addnl Minors: 1 ENGL	08/21/98			
Addnl Specs: 1				

Review Student Program Reqmts:

Adding a Standard Requirement

The second window from the top of the PGEC form displays characteristics of the program that you cannot modify in the PGEC form. The program attributes listed in this window (such as Majors, minors) are associated to the student by virtue of being assigned to the program. The student inherits the programs attributes as defined on the Academic Programs (PROG) form. You may not disassociate these attributes from the student without assigning the student to another program. You may, however, add constituents (for example,

add an additional major) by entering the additional constituents in the Addnl CCDs, Addnl Majors, Addnl Minors, and Addnl Specs fields of the PGEC form.

To add a constituent, you *must* enter the name of the constituent in the applicable field *and* then link a requirement to that constituent in either the Standard Reqmt field or the Cust field. For example, if you want to add a certified public accountants (CPA) examination to a student's program, you would enter the code for the public accountants certification in the Addnl CCDs field and enter the CCD requirement in the Addnl CCDs Standard Reqmt field. The Cust field defaults to No when you enter a standard requirement.



Note: If you do not link the requirement, the student is *not* required to do anything to complete the additional requirement. For example, if you added Math to the Addnl Majors field but did not associate that additional major with a requirement, the student *is* considered a math major but will be able to graduate in the math major *without* needing to take any extra math courses because you never indicated the work he needs to complete.

You can access the Requirements (REQU) form to view detailed information about a standard requirement by detailing from a requirement listed in the Standard Reqmt field. In the example listed above (and displayed in Figure 9), to view the CPA CCD requirement, highlight the CPA CCD record in the Addnl CCDs Standard Reqmts field and detail to the REQU form. For more information about defining requirements, see [Procedures for Defining an Academic Program on page 34](#).

To specify a custom constituent (requirement), detail on the constituent's Cust field to access the Custom Academic Requirements (QCRS) form. You can specify the custom constituent on the QCRS form. When you finish from the QCRS form, the constituent's Cust field displays a "Yes" (on the PGEC form).

Reviewing Student Program Requirements

You can view the student's entire program including exceptions and waivers by detailing from the Review Student Program Reqmts field. For more information about viewing a student's program requirements, see [Running the Evaluation on page 98](#).

Procedures for Adding Standard Requirements to a Program

Follow the steps to add a standard requirement to a students program:

Step 1. Access the student's program record on the PGM Evaluation/Customization (PGEC) form.

You can access the PGEC form from the menu level, or by detailing from the Student Academic Program (SACP) form and from the Applications (APPN) form.



Note: For more information about the SACP form, see the *Using Academic Records* manual. For more information about the APPN form, see the *Using Recruitment/Admissions Management* manual.

Step 2. Enter the additional requirement in the appropriate field.

For example, if you are entering an additional major, access the Addnl Majors field.

Step 3. Enter the date the additional requirement becomes a part of the student's program.

The requirement Start Date field is required.

Step 4. Enter the name of the standard requirement in the Standard Reqmt field.

You may view the requirement by detailing to the Academic Requirement (REQU) form from the Standard Reqmt field.

If adding other requirements to this program, repeat this procedure beginning with [Step 2](#).

Step 5. Save the record.

Adding a Custom Requirement

If you want to create a custom requirement for the student's program, you can access the Custom Academic Requirement (QCRS) form to add a custom requirement by detailing from the Cust field on the PGM Customization/Evaluation (PGEC) form.

For example, you could add the Spanish minor to a student's program and create specifications for this student only. Figure 9 shows the addition of the English minor to the student's record. To create a custom requirement, detail from the Cust field to the QCRS form. Figure 10 shows the custom requirement specifications.

You must enter the specifications in Degree Audit syntax (see [Degree Audit Syntax on page 137](#)), using either the keyword provided or the synonyms your institution defined. Use the Print Text field and print phrases in the Degree Audit syntax to document and format how the specification prints out on the evaluation and in WebAdvisor.

Figure 10: Example of the Custom Academic Requirement (QCRS) Form

The image displays two screenshots of the QCRS form. The top screenshot is for a proposed student program for Katie Hancock. It includes fields for Acad Program (AA.COMP), Acad Level (UG), Degree (AA), Catalog (2002), Majors (COMP), Minors, and Specs. It also has an 'Evaluate' section with a 'Not Current' button and a 'Customizations' section with 'Exceptions/Overrides' set to 0/0. A table for 'Addnl' requirements is partially visible. The bottom screenshot is for a custom requirement for Miss Katie R. Hancock, titled 'English Minor' under the 'UG Undergraduate Grade Scheme'. It lists specifications: '1) # GROUP.ID 19918;' and '2) TAKE 21 CREDITS;'. There are also 'Print Text' fields at the bottom.

Noteworthy fields in the QCRS Form

The fields described in this section are particularly important to creating custom academic requirements. See online help for additional information about fields on this form.

Title

List the requirement's title or enter a description of the requirement. This title appears on the evaluation.

Grd Scheme

Specify a grade scheme for this requirement. The grade scheme supports a minimum grade phrase.

This field defaults to the grade scheme for the academic program that is associated with the selected student. You can accept the default or select a different grade scheme.

Specification

A specification consists of one or more groups. Each group is a collection of one or more of the phrases listed below. If more than one group is specified, then each group must be prefixed with “#” to mark the start of a new group. If more than one group is specified, and the student can select from among them, then the entire specification must be preceded with a “TAKE x GROUPS” phrase.

Correcting Errors in the Specification

When you save the record, the specification is compiled and checked for syntax errors. If you did not enter the specification in Degree Audit syntax, the specification is displayed on a view-only form with an arrow pointing to the error. When you exit the form, the QCRS form is displayed with the error highlighted.

Figure 11: Example of Specification Error.

The figure consists of two screenshots from a software application. The top screenshot shows a student record for Hancock, Miss Katie R. with ID 1093864 and SSN 123-65-9499. The student is enrolled in a Bachelor of Arts in History program. A custom requirement is defined with the title 'English Minor' and the grade scheme 'UG Undergraduate Grade Scheme'. The specification for this requirement is as follows:

Line	Text
1	1) # GROUP.ID 19918;
2	2) TAKE 21 CREDITS;
3
4	
5	
6	

The bottom screenshot shows the 'Specification Errors' window, which lists the following error messages:

Line	Message
1	Specification Error
2	
3	Unrecognized or unexpected word at line 1.
4
5	> 1) SPECIFICATION ERROR
6	^
7	2)
8	3) UNRECOGNIZED OR UNEXPECTED WORD AT LINE 3.
9
10	
11	The word "SPECIFICATION" is not expected.
12	
13
14	One of the following was expected (would have been valid):
15	- word TAKE



Note: When you create a custom requirement for a student's program, the requirement can be used only for this student and only for this program. If you delete the custom requirement from the student's program, the requirement is deleted from the database.

Procedure for Adding a Custom Requirement to a Student's Program

Follow the steps below to add a custom requirement to a student's program.

Step 1. Access the student's record on the PGM Evaluation/Customization (PGEC) form.

Step 2. Enter the additional requirement.

If you are adding a custom major, enter the additional requirement in the Addnl Majors field.

Step 3. Access the Custom Academic Requirement (QCRS) form.

You can access the QCRS form by detailing from the Cust field.

Step 4. Enter a title for the custom requirement.

Step 5. Select a grade scheme.

Step 6. Enter the requirement specifications.

Step 7. Save the record from the QCRS form.

Step 8. If you want to add other custom requirements, repeat this procedure beginning with [Step 2](#).

Step 9. Save the record from the PGEC form.

Granting Exceptions

In This Chapter

This chapter describes exceptions and how to grant exceptions from a requirement.

Table 13: Topics in This Chapter

Topic	Page
Understanding Exceptions	68
Program-Level Exceptions	71
Requirement-Level Exceptions	76
Subrequirement-Level Exceptions	83

Before You Begin

Before you grant exceptions you should:

Table 14: Information Needed Before You Grant Exceptions

Action	Reference
Set up the academic requirement type codes	<i>Getting Started with Colleague Student</i>
Set up the CCDs	
Set up the Degree Codes	
Set up the Grade Codes	
Set up the majors	
Set up the minors	
Set up the specializations	
Define the program	Defining a New Academic Program beginning on page 25
Assign the student to a program	<i>Using Academic Records</i>

Understanding Exceptions

An exception is a deviation from the requirements of a program. You can grant exceptions at the overall program level, the requirement level, the subrequirement level, or the group level of the program. The exceptions for each level type are outlined in the sections below.



Note: In the course planning wizard in WebAdvisor, a group is called a component.

Setting Up Exceptions

Use the Exceptions and Overrides (EXOV) form to grant exceptions. You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Figure 12: Example of the Exceptions and Overrides (EXOV) Form

Detail to the Exceptions and Overrides (EXOV) form from the PGM Evaluation/Customization (PGEC) form

The image shows two screenshots of a software interface. The top screenshot is the 'PGEC-Pgm Evaluation/Customization' form for student 'Hancock, Katie'. It displays fields for Acad Program (AA.COMP), Acad Level (UG), Degree (AA), Catalog (2002), Majors (COMP), and Minors. It also has an 'Evaluate' dropdown set to 'Not Current' and a 'Last Evaluation Date' field. Below this is a 'Customizations' section with 'Exceptions/Overrides' set to '0/0' and a 'Custom Title' field. A table lists 'Addnl CCDs', 'Addnl Majors', 'Addnl Minors', and 'Addnl Specs', each with a quantity of 1 and a red background. At the bottom is a 'Review Student Program Reqmts' checkbox.

The bottom screenshot is the 'EXOV-Exceptions and Overrides' form for student 'Swanson, Mr. Albert W.'. It shows 'Evaluate' set to 'Not Current' and 'Last Evaluation Date' and 'Last Evaluation Status' fields. Below is a table with columns 'E/O', 'Stat', and 'Requirements'. The table contains seven rows of requirements for a Bachelor of Science in Accounting program.

E/O	Stat	Requirements
1		PROG: Bachelor of Science in Accounting
2		REQMT1: JV.TST Test for Gus
3		SUBREQMT1: A
4		Additional Minor: ENGL
5		REQMT2: Custom English Minor Requirements
6		SUBREQMT1: Custom Subreqmt
7		

When you access the EXOV form, the form displays an outline of the student's program. The window controller displays an "X" if an exception or override was granted to a requirement. After you run an evaluation from this form, the Stat field displays the evaluation status for each of the requirements and subrequirements.

In [Figure 12](#), exceptions were granted to requirements and subrequirements. You can detail on either the requirement or subrequirement to view information about the exception. For more information about requirement-level exceptions, see [Requirement-Level Exceptions beginning on page 76](#). For more information about subrequirement-level exceptions, see [Subrequirement-Level Exceptions beginning on page 83](#).

Program-Level Exceptions

You can grant exceptions to the program-level requirements such as credits and GPA. You can grant exceptions by modifying or waiving:

- the overall program credits
- the overall program GPA
- the credits earned at your institution
- the GPA earned at your institution

To grant program level exceptions, you must highlight the program's title and detail to the Program-Level Exceptions (PGEX) form. The PGEX form is available only as a detail form from the EXOV form.

Figure 13: Example of the Program-Level Exceptions (PGEX) Form

The screenshot displays two overlapping windows from a software application. The top window is titled 'EXOV-Exceptions and Overrides' and shows student information for Albert W. Swanson (ID: 0000056, SSN: 567-89-2000, Age: 44, Birth: 01/01/1959) and his academic program, Bachelor of Science in Accounting. It includes an 'Evaluate' button set to 'Not Current' and fields for 'Last Evaluation Date' and 'Last Evaluation Status'. Below this is a table of requirements:

E/O	Stat	Requirements
1		PRG: Bachelor of Science in Accounting
2		REQMT1: JV.TST Test for Gus
3		SUBREQMT1: A
4		Additional Minor: ENGL
5		REQMT2: Custom English Minor Requirements
6		SUBREQMT1: Custom Subreqmt
7		
8		
9		
10		
11		
12		

The bottom window is titled 'PGEX-Program-Level Exceptions' and shows the same student information. It features an 'Eval Status' dropdown set to 'Not Current' and a 'Program Last Evaluation Date/Status' field. The main section is a table for entering exceptions:

	Exception	Orig Reqmt	Earned	Complete
Overall Credits	<input type="text"/>	130.00	<input type="text"/>	<input type="text"/>
Institutional Credits	<input type="text"/>	130.00	<input type="text"/>	<input type="text"/>
Overall GPA	<input type="text"/>	2.100	<input type="text"/>	<input type="text"/>
Institutional GPA	<input type="text"/>	2.100	<input type="text"/>	<input type="text"/>

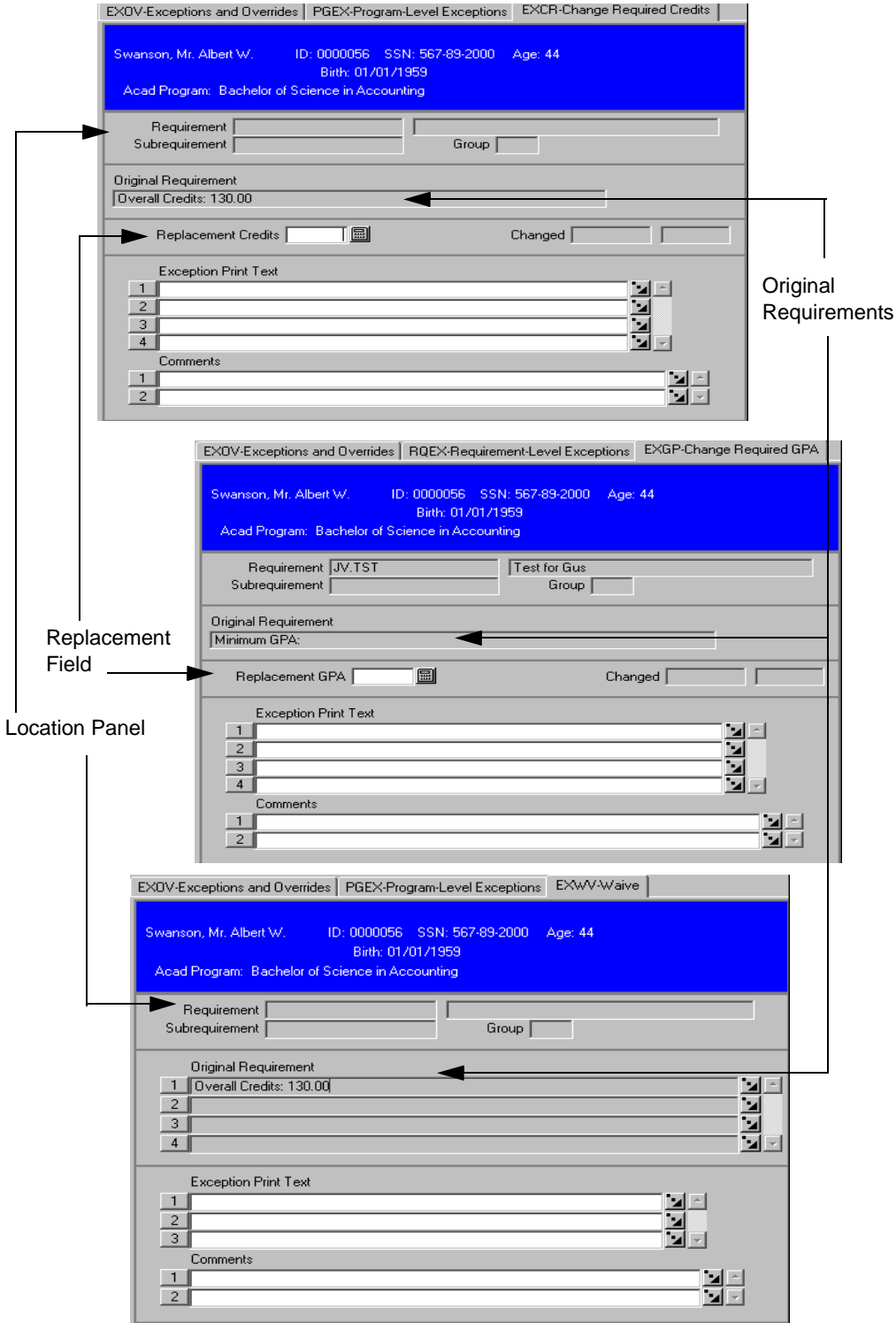
From the PGEX form, you can grant exceptions to the overall credits, the institutional credits, the overall GPA, and the institutional GPA. Depending on the exception you want to make, you can access three separate forms: the Waive (EXWV) form, where you can waive either the GPA or the number of credits, the Change Required Credits (EXCR) form, and the Change Required GPA (EXGP) form. Each of these forms look and function alike. The only difference is the form title and area of the program affected. (See [Figure 14.](#))

Access the program item you want to make an exception to and detail to the item's exception or waiver form. For example, if you want to grant an exception to the overall credits, access the Overall Credits field and detail to the Change Required Credits (EXCR) form.



Note: If you want to waive the overall credits requirement, access the Overall Credits field and detail to the Waive (EXWV) form. You must enter exception print text and save from the EXWV form to create the waiver.

Figure 14: Example of the Exceptions - Credits (EXCR) Form, the Change Required - GPA (EXGP) Form, and the Waive (EXWV) Form



Exception Form Attributes

All exception entry forms, whether at the program, requirement, or subrequirement level, have the same general look and share the following windows and fields:

Location window - indicates the part of the program (requirement, subrequirement, or group) affected by the exception.

Original Requirements window - displays the requirement prior to the exception.

Replacement field - enter the replacement requirement (Note: The Waive forms do not have a replacement field since you are waiving the entire requirement.)

Exception Print Text field - displays the text you enter to describe the exception. This text will appear on the evaluation report. See the description outlined below.

Comments field - enter any comments about the exception, such as why you granted the exception to the requirement, or the conditions under which the exception is granted.

Defining the Exception Print Text

You must enter free-form text about the exception in the Exception Print Text field. The text you enter will be printed on the evaluation and displayed in WebAdvisor on the Exceptions form in the course planning wizard, therefore, you should enter it exactly as you want it printed. You can access the text editor for easier data entry.

Procedure for Granting Program-Level Exceptions

Follow the steps below to grant program-level exceptions.

Step 1. Access the student's program record on the Exceptions and Overrides (EXOV) form.

You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Step 2. Access the program listing on the EXOV form.

Step 3. Detail to the Program-Level Exceptions (PGEX) form.

Step 4. Access the program requirement (i.e., institutional GPA).

Step 5. Detail to the requirement's exception or waiver form.

Each of the program level requirements has both an exception and waiver form. You can access either form by detailing from the program requirement on the PGEX form.

Step 6. Complete the exception or waiver form.

If you are granting an exception, you must enter the new value and the exception print text (in the Exception Print Text field). The text you enter in this field will be printed on the evaluation and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

Step 7. Save from the exception or waiver form.

Step 8. Save from the PGEX form.

Step 9. Save from the EXOV form.

Requirement-Level Exceptions

You can grant exceptions at the requirements level of a program. You can also waive or replace the entire requirement. Use the Exceptions and Overrides (EXOV) form to grant an exception to a requirement (refer to [Figure 12 on page 69](#)).

To grant requirement-level exceptions, you must access the student's program record on the EXOV form, highlight the requirement title in the student's program and detail to the Requirement-Level Exceptions (RQEX) form. The RQEX form is available only as a detail form from the EXOV form.

From the RQEX form, you can replace or waive the requirement GPA, specify the minimum number of credits that a student must take at an institution to complete the requirement, and change the number of subrequirements needed to satisfy the requirement. You can also replace or waive the entire requirement. Depending on the exception you want to make, you can access four different forms: the Waive (EXWV) form, the Change Required - GPA (EXGP) form, the Change Required - Number (EXCT) form, and the Replace Entire Block (EXBR) form.

To make an exception to the requirement, access the requirement item on the RQEX form and detail to the item's exception or waiver form. For example, if you want to replace the requirement with a course(s), access the Replaced field and detail to the Replace Entire Block (EXBR) form ([Figure 15](#)).

Figure 15: Example of the Replace Entire Block (EXBR) Form Accessed from the Requirement-Level Exceptions (RQEX) Form

The figure consists of two screenshots of a web application interface. The top screenshot shows the 'RQEX-Requirement-Level Exceptions' form for student Hancock, Katie (ID: 0027486). The form displays requirement details for GENERAL_STUDIES_87, including GPA, credits, and subrequirements. The bottom screenshot shows the 'EXBR-Replace Entire Block' form for the same student and requirement, with a red highlight on the 'Exception Print Text' field. An arrow points from the 'Waived' field in the top form to the 'EXBR-Replace Entire Block' form.

Waiving the Entire Requirement

You can waive the entire requirement by accessing the Waived field and detailing to the Waive (EXWV) form. To complete the waiver, you must enter text in the Exception Print Text field. The text you enter will print out on evaluations run against this program. You can detail to a general editor for easier data entry.

Procedures for Granting Requirement-Level Exceptions

You can grant exceptions to several areas of the requirement. You can do the following:

- grant an exception to the GPA for the requirement
- grant an exception to the number of subrequirements needed to satisfy the requirement
- waive the entire requirement
- replace the entire requirement

Use the Requirement-Level Exceptions (RQEX) form to grant requirement-level exceptions. You can access the RQEX form by detailing from the requirement listing in the Requirements group of the Exceptions and Overrides (EXOV) form. Refer to “[Requirement-Level Exceptions](#)” and on-line help for information about the fields on the RQEX form.

Procedure for Granting Exceptions to the Requirement GPA

To grant an exception to the requirement GPA, you must:

Step 1. Access the student’s record on the Exceptions and Overrides (EXOV) form.



Note: You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Step 2. Highlight the requirement item listed in the student’s program and then detail to the Requirement-Level Exceptions (RQEX) form.

Step 3. Access the Requirement GPA field and detail to either the Change Required GPA (EXGP) form, or the Waive (EXWV) form.

Use the EXGP form to change the required GPA. Use the EXWV form to waive the required GPA.

Step 4. Complete the form.

You must enter a new GPA in the Replacement GPA field.

You must also enter text in the Exception Print Text field. The text you enter here will be printed on evaluations run against this program and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

If you want to waive the GPA, you must enter text in the Exception Print Text field on the EXWV form to complete the waiver. The text you enter will print out on the evaluations run against this program.

Step 5. Save the record.

You must save from the RQEX and EXOV forms to save your work. If you cancel from any of these forms, the work will not be recorded.

Procedure for Granting Exceptions to the Requirement Institutional Credits

To grant an exception to the requirement institutional credits, you must:

Step 1. Access the student's record on the Exceptions and Overrides (EXOV) form.



Note: You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Step 2. Highlight the requirement item listed in the student's program and detail to the Requirement-Level Exceptions (RQEX) form.

Step 3. Access the Requirement Inst Credits field and detail to either the Change Required Credits (EXCR) form, or the Waive (EXWV) form.

Use the EXCR form to change the required institutional credits. Use the EXWV to waive the required institutional credits.

Step 4. Complete the form.

If you want to change the number of institutional credits for this requirement, enter the new amount in the Replacement Credits field.

You must also enter text in the Exception Print Text field. The text you enter here will be printed on evaluations run against this program and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

If you want to waive the GPA, you must enter text in the Exception Print Text field on the EXWV form to complete the waiver. The text you enter will print out on the evaluations run against this program.

Step 5. Save the record.

You must save from the RQEX and EXOV forms to save your work. If you cancel from any of these forms, the work will not be recorded.

Procedure for Granting an Exception to the Number of Subrequirements

To grant an exception to the number of subrequirements you must:

Step 1. Access the student's record on the Exceptions and Overrides (EXOV) form.

Step 2. Highlight the requirement item listed in the student's program and detail to the Requirement-level Exceptions (RQEX) form.

Step 3. Access the Number of Subrqmts Needed field and detail to the Change Required Number (EXCT) form.

Step 4. Complete the form.

You must enter a value in the Replacement Count field.

You must also enter text in the Exception Print Text field to complete the waiver. The text you enter will print out on the evaluations run against this program.

Step 5. Save the record from the EXCT form.

Step 6. Save the record from the RQEX form.

Step 7. Save the record from the EXOV form.

Procedure for Waiving a Requirement

To waive a requirement you must:

Step 1. Access the student's record on the Exceptions and Overrides (EXOV) form.

You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Step 2. Highlight the requirement item listed in the student's program and detail to the Requirement-Level Exceptions (RQEX) form.

Step 3. Access the Waived field and detail to the Waive (EXWV) form.

You can view the entire requirement by detailing from the Original Requirement field.

You must enter text in the Exception Print Text field to complete the waiver. The text you enter will print out on the evaluations run against this program.

Step 4. Save from the EXWV form.

Step 5. Save from the RQEX form.

Step 6. Save the record from the EXOV form.

Procedure for Replacing the Entire Requirement

To replace the entire requirement you must:

Step 1. Access the student's record on the Exceptions and Overrides (EXOV) form.

Step 2. Highlight the requirement item listed in the student's program and detail to the Requirement-level Exceptions (RQEX) form.

Step 3. Access the Replaced field and detail to the Replace Entire Block (EXBR) form.

Step 4. Complete the form.

You can view the entire requirement by detailing from the Original Requirement field.

You must enter the course(s) replacing the requirement in the Course field.

You must also enter text in the Exception Print Text field to complete the waiver. The text you enter will print out on the evaluations run against this program.

Step 5. Save the record.

You must save from the RQEX and EXOV forms to save your work.

Subrequirement-Level Exceptions

You can grant a multitude of exceptions at the subrequirement level of a program. You can:

- Waive or replace the entire subrequirement or group.
- Waive or replace the subrequirement's GPA.
- Waive or replace the group GPA.
- Change the number of institutional credits required.
- Change the number of groups required.
- Change the number of credits required.
- Change the number of courses required.
- Waive or substitute specific courses.

Use the Subrqmt-Level Exception (SREX) form to grant an exception to a subrequirement. You can access the SREX form from the Exceptions and Overrides (EXOV) form. Highlight the subrequirement item on the EXOV form and detail to the SREX form.

The following sections outline the procedures for granting the various types of exceptions. The procedures for each type are uncomplicated and similar and explained in the overview. Each type, however, is outlined in more detail in the subsequent subsections.

Figure 16: The Subrqmt-Level Exception (SREX) Form

Exceptions Overview

When you access a subrequirement on the SREX form (Figure 16), each line that you can place an exception against has a code in the Ex column. The codes are as follows:

- A period (.) means you *can* place an exception against the item.
- No code (null) means you *cannot* place an exception against the subrequirement item.
- “R” indicates a replacement type exception has been applied to this line. (If needed, a lowercase “r” is displayed on subsequent lines to show the extent of what was replaced.)
- “W” indicates the line item has been waived. (If needed, a lowercase “w” is displayed on subsequent lines to show the extent of what was waived.)
- “E” indicates an eligibility type exception (another course can be completed to satisfy this subrequirement).

Within the SREX form, you can make exceptions to any of the elemental constituents of a subrequirement. On most lines, the types of exceptions you can grant may be obvious. For example, if the line reads “Minimum GPA

2.5,” then you can either modify that GPA requirement or waive it by detailing from that line to either the Change Required - GPA (EXGP) form or the Waive (EXWV) form.

The specification has the subrequirement header line and/or a group header line. The information indented beneath each header line belongs to that header and is considered a “block.” If you detail on the header line, you can either waive or replace the entire block. In [Figure 16 on page 84](#), if you detailed on the subrequirement header line, you would waive everything indented under the subrequirement line including group one (1).

Granting Exceptions to the Entire Subrequirement

You can either replace or waive the entire subrequirement. When you detail from the subrequirement title line on the SREX form, you may access either the Replace Entire Block (EXBR) form, or the Waive (EXWV) form. For example, if you want to replace the subrequirement, access the subrequirement title line and detail to the EXBR form.



Note: To waive the entire subrequirement, access the subrequirement title line and detail to the Waive (EXWV) form.

Replacing the Entire Subrequirement

You can replace the entire subrequirement by accessing the subrequirement header line (title line) and detailing to the Replace Entire Block (EXBR) form. To complete the replacement, you must enter the replacement course(s) in the Course field and enter text in the Exception Print Text field. The text you enter in the Exception Print Text field will be printed out on the evaluations run against this program and displayed in WebAdvisor on the Exceptions form in the course planning wizard. You can detail to a general editor for easier data entry.

Waiving the Entire Subrequirement

You can waive the entire subrequirement by accessing the subrequirement header line (title line) and detailing to the Waive (EXWV) form. To complete the waiver, you must enter text in the Exception Print Text field. The text you enter will print out on evaluations run against this program. You can detail to a general editor for easier data entry.

Procedure for Granting Exceptions to the Entire Subrequirement

Follow the steps below to grant exception to an entire subrequirement.

Step 1. Access the student's record on the Exceptions and Overrides (EXOV) form

You can access the EXOV form from the menu level, or by detailing from the Exceptions/Overrides field on the PGM Evaluation/Customization (PGEC) form.

Step 2. Highlight the subrequirement item listed in the student's program and detail to the Subrqmt-Level Exception (SREX) form.

Step 3. Access the subrequirement title line and detail to either the Replace Entire Block (EXBR) form or the Waive (EXWV) form.

Step 4. Complete the form.

If you accessed the EXBR form, you must enter at least one course as the replacement course in the Courses field.

You must enter text in the Exception Print Text field on either the EXBR form or the EXWV form to complete the waiver. The text you enter will be printed out on evaluations run against the program and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

Step 5. Save the record.

You must save from the SREX and EXOV forms to save the record.

Granting Exceptions to Items within a Subrequirement

You can grant exceptions to a subrequirement item such as subrequirement GPA, or count. Access the subrequirement item and detail to the exceptions form. The following subsections outline each possible exception.

Changing or Waiving the Subrequirement GPA

To change the subrequirement GPA, access the minimum GPA item and detail to the Change Required - GPA (EXGP) form. To waive the subrequirement GPA, access the minimum GPA item and detail to the Waive (EXWV) form.

Changing the Subrequirement Inst Credits

To change the subrequirement institutional credits, access the institutional credits item and detail to the Change Required Credit (EXCR) form.

Changing or Waiving the Subrequirement Count

To change the subrequirement count (number of credits), access the count line item on the SREX form and detail to the Change Required Number (EXCT) form. To waive the subrequirement count, access the count line item and detail to the Waive (EXWV) form.

Procedure for Granting Exceptions to a Subrequirement GPA or Credit Count

Use the Subreqmt-Level Exceptions (SREX) form to grant an exception to a subrequirement GPA or credit count. You can access the SREX form by detailing from the Exceptions and Overrides (EXOV) form. Refer to [“Granting Exceptions to Items within a Subrequirement”](#) and online help for information on the EXOV form.

To grant exceptions to a subrequirement GPA or credit count you must:

Step 1. Access the student's record on the SREX form.

Step 2. Access the subrequirement item and detail to the exceptions form.

If granting an exception to the subrequirement GPA, access the Change Required GPA (EXGP) form.

If granting an exception to the subrequirement count, access the Change Required Number (EXCT) form.

If granting an exception to the subrequirement credit, access the Change Required Credit (EXCR) form.

If you want to waive the subrequirement item, access the Waiver (EXWV) form.

Step 3. Complete the form.

Step 4. Save the record.

You must save from the exceptions form and the SREX form to save your work.

Granting Exceptions to a Group within a Subrequirement

Depending on its complexity, a subrequirement may be divided into groups. You can grant exceptions to a group within a subrequirement by detailing from the group header. You can either grant an exception to the entire group, allow additional courses to satisfy group requirements, or waive the entire group.

Replacing the Entire Group

Use the Replace Entire Block (EXBR) form to replace the entire group (see [Figure 15 on page 77](#)). You can access the EXBR form by detailing on the group listing on the Subrequirement-Level Exceptions (SREX) form ([Figure 16 on page 84](#)).

To replace the entire group, you must enter replacement courses in the Course field. You also must enter text in the Exception Print Text field. The text you enter will be printed out on evaluations run against the program and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

Waiving the Entire Group

You can waive a group within a subrequirement by accessing the group item and detailing to the Waiver (EXWV) form. You must enter text in the Exceptions Print Text field to complete the waiver. The text you enter here will print out on the evaluations run against the program.

Allowing Additional Courses

You may wish to allow a student to apply one or more courses toward a requirement where the course is not specified as eligible. The method you use depends on how the requirement is specified. If the requirement is specified as a course list, then you should apply a waiver or substitution to the course. If the requirement is not a course list, then you can add the course on the Allow Additional Courses (EXAC) form. You can access the form by detailing from the group listing on the SREX form. You *must* enter the additional course(s) in the Additional Eligible Courses field *and* enter text in the Exception Print Text field. The text you enter will print out on evaluations run against the program.

Figure 17: The Allow Additional Courses (EXAC) Form

The screenshot shows the 'EXAC-Allow Additional Courses' form for student Swanson, Mr. Albert W. The form is divided into several sections:

- Header:** Swanson, Mr. Albert W. ID: 0000056 SSN: 567-89-2000 Age: 44
Birth: 01/01/1959
Acad Program: Bachelor of Science in Accounting
- Requirement:** JV.TST (Test for Gus)
- Subrequirement:** A (Group 1)
- Original Group Requirement:**
 - 1 Group 1
 - 2 Take 25 credits
- Additional Eligible Courses:**
 - 1 []
 - 2 []
 - Changed [] []
- Exception Print Text:**
 - 1 []
 - 2 []
- Comments:**
 - 1 []

Procedure for Granting Exceptions to a Group within a Subrequirement

To grant exceptions to a group you must:

- Step 1.** Access the student's record on the Subrequirement-Level Exceptions (SREX) form.
- Step 2.** Access the group and detail to the exceptions form.

You can replace the entire group by accessing the Replace Entire Block (EXBR) form.

You can allow additional courses to be considered for the group by accessing the Allow Additional Courses (EXAC) form.

You can waive the group by accessing the Waive (EXWV) form.

Step 3. Complete the form.

Step 4. Save the record.

Granting Exceptions to Items within a Group

You can grant exceptions to individual items within a group such as count and credits. You can also grant an exception to an individual course or substitute another course for the course listed. Each method is described below.

Changing or Waiving the Subrequirement Credit Count

Access the group item on the SREX form and detail to the item's change form. For example, if you want to grant an exception to the number of credits a student must take within a group, access the credits line on the SREX form and detail to the Change Required - Credits (EXCR) form.

Waiving or Substituting Courses

Access the course line on the SREX form and detail to the Course Waivers and Subst (EXCL) form. You must enter the course being replaced in the Courses No Longer Required field and enter text in the Exception Print Text field. The text you enter here will print out on evaluations run against the program. If you are substituting another course, you must enter the new course in the Additional Courses Required field.

Figure 18: The Course Waivers and Subst (EXCL) Form

Procedure for Granting Exceptions to Items within a Group (Credit Count or Courses)

To grant exceptions to items within a group you must:

- Step 1.** Access the student's record on the Subrequirement-Level Exceptions (SREX) form.
- Step 2.** Access the group item (credit count or course) and detail to the exceptions form.

If you are granting an exception to a credit count, access the count line and detail to the Change Required Credits (EXCR) form.

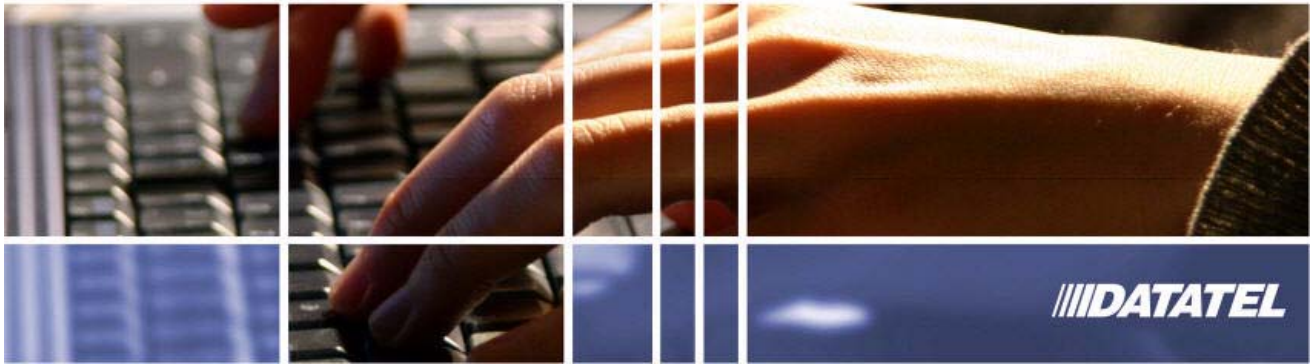
If you are waiving the credit count, access the Waive (EXWV) form.

If you are granting an exception to a course, access the course listing and detail to the Course Waivers and Subst (EXCL) form.

Step 3. Enter text in the Print Text field. The text you enter will be printed out on the evaluations and reports run against this program and displayed in WebAdvisor on the Exceptions form in the course planning wizard.

Step 4. Complete the form.

Step 5. Save the record.



Using Degree Audit

Student Advising

Evaluating a Student's Academic Progress

In This Chapter

This chapter provides the procedures for performing an evaluation on a student's academic program. [Table 15](#) lists the topics covered in this chapter.

Table 15: Topics in This Chapter

Topic	Page
Understanding Program Evaluation	98
Overriding Evaluator Decisions	99

Before You Begin

[Table 16](#) lists the setup needed before you perform an evaluation on a student's record.

Table 16: Information Needed Before You Perform an Evaluation

Action	Reference
Set up the CCD codes	<i>Getting Started with Colleague Student</i>
Set up the Major codes	
Set up the Minor codes	
Set up the Specification codes	
Set up the Academic Evaluation Sort Order	

Understanding Program Evaluation

After a student is assigned to an academic program, you can perform an evaluation to monitor the student's progress toward the completion of the program. The program must have academic requirements associated with it in order to be evaluated. If you just want to evaluate the program, and not make any changes to it, you can use the Evaluate Student Program (EVAL) form directly. If you want to customize the requirements, use the PGM Evaluation/Customization (PGEC) form to perform the evaluation. This form allows you to make changes to the program, after which you can run an evaluation.

You can evaluate a student's program at various stages of completion. An evaluation can be run with or without including in-progress courses, registered/pre-registered courses, or planned courses. You can also evaluate a student's program by a date. Only activity that is, or is anticipated to be, completed by that date will be included.



Note: Students and advisors can also run a program evaluation in WebAdvisor using Program Evaluation. For more information, see *WebAdvisor for Colleague Student*.

Running the Evaluation

You can perform the evaluation by detailing from the Evaluate field on the Evaluate Student Program (EVAL) form or on the Pgm Evaluation/Customization (PGEC) form, by running the Batch Academic Evaluation (BEVL) process, or by selecting Program Evaluation from WebAdvisor.



Note: A program evaluation is automatically run behind the scenes as part of the course planning wizard in WebAdvisor. You can also perform a "what-if" evaluation by running the Proposed Student Program (PSPR) process, or by selecting Program Evaluation from WebAdvisor.

Colleague evaluates the student's course work and non-course work, including transferred activity, based on the parameters and match order you set up on the Academic Evaluation Defaults (AEDF) and Academic Evaluation Sort Types (AEST) forms. For more information about setting up the match order, see the *Getting Started with Colleague Student* manual.

Overriding Evaluator Decisions

The evaluator matches a student's academic credit and planned courses against the program requirements based on the parameters you set up (see the *Getting Started with Colleague Student* manual). Your institution's policies regarding course work completed at your institution, course work transferred from another institution, registered course work, preregistered course work, and planned course work dictate your setup and how a credit is applied within each program. For example, you may set up Degree Audit so the evaluator first considers the academic credit completed at your institution before it applies transfer credits.

If you have authority, Colleague allows you to override the evaluator's decisions about which actual course work (completed, registered, or preregistered courses) is used to satisfy which requirement, and you may redirect the application of those courses using the Exceptions and Overrides (EXOV) form. You can access the EXOV form from the menu or from the PGM Evaluation/Customization (PGEC) form.

From the EVOV form, select the subrequirement and detail to the Subrequirement Overrides (SROV) form. If the subrequirement consists of groups, you can override the groups individually. Access the group, and then detail to the Evaluation Override (EVOV) form. The workflow is outlined in [Figure 19 on page 100](#).



Note: In the course planning wizard in WebAdvisor, a group is called a component.

Figure 19: Workflow for Overriding the Application of Academic Credit

The figure illustrates a three-step workflow for overriding academic credit in a software application. Each step is shown in a separate screenshot, with arrows indicating the flow from one step to the next.

Step 1: PGEC-Pgm Evaluation/Customization
 This screen shows the student's information: Swanson, Mr. Albert W., ID: 0000056, SSN: 567-89-2000, Age: 44, Birth: 01/01/1959, and Acad Program: Bachelor of Science in Accounting. The 'Evaluate' dropdown is set to 'Not Current'. A table lists requirements with checkboxes for 'E/O' and 'Stat':

E/O	Stat	Requirements
1	<input type="checkbox"/>	PROG: Bachelor of Science in Accounting
2	<input type="checkbox"/>	REQMT1: JV.TST Test for Gus
3	<input type="checkbox"/>	SUBREQMT1: A
4	<input type="checkbox"/>	Additional Minor: ENGL
5	<input type="checkbox"/>	REQMT2: Custom English Minor Requirements
6	<input type="checkbox"/>	SUBREQMT1: Custom Subreqmt
7	<input type="checkbox"/>	
8	<input type="checkbox"/>	
9	<input type="checkbox"/>	
10	<input type="checkbox"/>	
11	<input type="checkbox"/>	
12	<input type="checkbox"/>	

Step 2: SRDV-Subrequirement Overrides
 This screen shows the same student information. The 'Requirement' is 'JV.TST Test for Gus' and 'Eval Status' is 'Not Current'. A table lists subrequirement specifications with checkboxes for 'Ov':

Ov	Subrequirement Specifications
1	Subreqmt: A
2	Group 1
3	Take 25 credits
4	Maximum 6,5 100,200,300,400 level credits
5	
6	
7	
8	
9	
10	
11	
12	

Step 3: EVOV-Evaluation Override
 This screen shows the same student information. The 'Requirement' is 'JV.TST Test for Gus', 'Subrequirement' is 'A', and 'Group' is '1'. It contains two tables for course evaluation:

Courses to Apply		Term	Completed	Grade
1				
2				
3				
4				

Courses to Exclude		Term	Completed	Grade
1				
2				
3				
4				

You can indicate courses to apply to the group or subrequirement as well as courses you do not want to apply. You *must* enter a course in either the Courses to Apply *or* Courses to Exclude fields.

Procedures for Overriding the Evaluator's Application of Academic Credit

Complete the following steps to override the evaluator's application of academic activity.

Step 1. Access the individual's program record on the Exceptions and Overrides (EXOV) form.

You can access the form from the menu or from the PGM Evaluation/Customizations (PGEC) form.

Step 2. Access the subrequirement you want to override, and detail to the Subrequirement Override (SROV) form.

Step 3. Access the subrequirement group you want to override and detail to the Evaluation Override (EVOV) form.

You must enter either a STUDENT.ACAD.CRED record to apply to the subrequirement or a STUDENT.ACAD.CRED record you do not want applied to the subrequirement.

Step 4. Finish from each form.

Performing a What-If Analysis

In This Chapter

This chapter describes how to perform a what-if analysis using Degree Audit. It can be used to evaluate how a student's academic credits and planned courses might be applied toward a particular academic program offered at your institution.



Note: Students and advisors can also run a what-if analysis in WebAdvisor by using the Program Evaluation option.

Before You Begin

Before you can evaluate a proposed academic program for a student, you must have already defined the academic programs for your institution. A student's credits and planned courses are evaluated to determine how they apply to the specific academic program being proposed.

Understanding the What-If Analysis

Proposing an academic program is a tool provided by Degree Audit that enables you and the student to evaluate and view an academic program as it relates to the student's academic activity. This is particularly helpful when a student decides to switch academic programs or wants to transfer to your institution from another school. Using this what-if analysis tool enables you to determine how a student's academic credits and planned courses can be applied to a specific academic program without actually assigning the program to the student.

The analysis is comprised of two parts:

- The proposed academic program offered at your institution.
- The student's academic activity as it would apply to the proposed program.

Academic Programs

A proposed academic program must be one that is already offered by your institution. You cannot use the what-if analysis tool to define a totally new academic program for a student. For information about defining an academic program, refer to [Defining a New Academic Program beginning on page 25](#) and [Defining Requirements beginning on page 35](#).

Although you cannot create an entirely new program with this process, you can use the Proposed Student Program (PSPR) form in Colleague to customize an existing program for a student. See [Understanding Custom Programs beginning on page 58](#) and [Understanding Exceptions beginning on page 68](#) for detailed instructions about how to customize an academic program. If, after viewing the evaluation, you want to associate the student with that program, you can save the program with a preliminary status, which can then be changed on the Student Academic Program (SACP) form.



Note: If you are proposing an academic program for an applicant, you cannot save the program. All program changes to applications must be made through the appropriate forms in the Admissions module. If you are running a what-if evaluation from WebAdvisor, you cannot save the program.

Student Academic Activity

When proposing a student program, the student's academic activity is evaluated as it relates to the proposed program's requirements. Academic activity can include courses completed at your institution, courses in progress (registered), future courses (pre-registered), transfer courses, and planned courses. Colleague evaluates the student's academic credits and planned courses in terms of how they apply to the proposed academic program.

Proposing a Student Program

One method of performing a what-if analysis is to use the Proposed Student Program (PSPR) form as shown in [Figure 20](#).

Figure 20: The Proposed Student Program (PSPR) Form

PSPR-Proposed Student Program

Hancock, Katie ID: 0027486
Hanover, MD

Program AA.COMP
Title AA.COMP
Degree Assoc Of Arts Minor(s)
Acad Level Undergraduate Spec(s)
Major(s) COMP CCD(s)
Catalog 2002-2003 Catalog
Desc 1

Student Programs	Catalog	Status	Start Dt	End Dt	Changed By
1 BA.ACCT	1995	Active	10/11/05		MEH
2					
3					

Evaluate

Last Eval Date
Last Eval Status

Program Customization Save Current Program No Loc

Noteworthy Fields on the PSPR Form

Academic Program

After you select the student, Colleague prompts you for the academic program you want to propose. You can enter the name of the program you want to evaluate or use the LookUp function to help you find the one you want.

Some academic programs may not be available for evaluation. If the Stu Select field on the Academic Programs (PROG) form is set to “No” for a program, then that program cannot be selected here.

If you select a program in which the student is already enrolled, Colleague notifies you that the student is already associated with that program. This is not an error, and you can still choose to evaluate that program. If a program is offered in more than one catalog, Colleague prompts you to choose the one you want to evaluate.

The top panel of the PSPR form displays the information associated with the academic program selected. The Student Programs part of the form displays a list of academic programs with which the student is already associated.

Evaluate

This field gives you access to the Evaluate Student Program (EVAL) form where you can modify the default parameters in order to tailor the evaluation to your needs. Refer to [Understanding Student Evaluations beginning on page 114](#) for more information about using the EVAL form.

Figure 21: Workflow for Evaluating a Proposed Student Program

The screenshot shows two windows from the PSMR system. The top window, titled "PSMR-Proposed Student Program", displays details for student Hancock, Katie (ID: 0027486) from Hanover, MD. The program is AA.COMP, an Associate of Arts degree, Undergraduate level, with a major in COMP. Below this is a table of "Student Programs" with columns for Program, Catalog, Status, Start Dt, End Dt, and Changed By. The first row shows BA.ACCT, Catalog 1995, Status Active, Start Dt 10/11/05, and Changed By MEH. At the bottom of this window are buttons for "Evaluate", "Program Customization", "Save Current Program", and "Loc".

An arrow points from the "Evaluate" button to the second window, titled "PSMR-Proposed Student Program EVAL-Evaluate Student Program". This window shows details for student Smith Jr., Mr. Alex L. (ID: 1053475 SSN: 555-99-1212) from Fairfax, VA. The program is Master of Arts in Spanish (MA.SPAN) from the 2006 Catalog. Below the student information are several dropdown menus and checkboxes for evaluation settings: "Include Code/Cutoff Date" (A All (includes planned)), "Format" (1 Single-column Report), "Related Courses Policy" (N Not Displayed), "Always Show Extra Courses" (No), and "Ignored Statuses" (1 X Deleted, 2 C Cancelled, 3).

Program Customization

From this field you can access the PGM Evaluation/Customization (PGEC) form where you can grant exceptions, specify overrides, and customize a student's program by specifying additional constituents and requirements. Refer to [Understanding Custom Programs beginning on page 58](#) and [Understanding Exceptions beginning on page 68](#) for additional information about customizing a student's program.

Figure 22: Workflow for Customizing a Proposed Student Program

The figure consists of two screenshots of a web application interface, connected by a downward-pointing arrow.

Top Screenshot: PSPR-Proposed Student Program

Header: Hancock, Katie ID: 0027486
Hanover, MD

Program: AA.COMP
Title: AA.COMP
Degree: Assoc Of Arts
Acad Level: Undergraduate
Major(s): COMP
Catalog: 2002-2003 Catalog
Desc: 1

Student Programs	Catalog	Status	Start Dt	End Dt	Changed By
1 BA.ACCT	1995	Active	10/11/05		MEH
2					
3					

Evaluate Last Eval Date: Last Eval Status:

Program Customization Save Current Program: No Loc:

Bottom Screenshot: PGEC: Program Evaluation/Customization

Header: Hancock, Katie ID: 0027486
Hanover, MD

Acad Program: AA.COMP
Acad Level: UG
Degree: AA
Catalog: 2002
Majors: COMP
Minors: Specs:

Evaluate Not Current
Last Evaluation Date: Last Evaluation Status:

Customizations
Exceptions/Overrides: 0/0
Custom Title:

	Start Dt	End Dt	Standard Reqmt	Cust
Addnl CCDs 1				
Addnl Majors 1				
Addnl Minors 1				
Addnl Specs 1				

Review Student Program Reqmts

Save Current Program

If you want to save the proposed program, you can set this field to “Yes,” and Colleague assigns it to the student with a preliminary status. Later, you can change it to an active status using the Student Academic Program (SACP)

form. If the proposed program is already associated with the student, setting this field to “Yes” results in any changes you made to the program on the PGEC form being saved.



Note: You cannot use this field for applicants because an applicant’s academic program is associated with an application. An application’s academic program must be changed using the appropriate form in the Admissions module. This field is functional only for students.

If you cancel out of the PSPR form, or leave this field set to “No,” no record of this program is kept.

Location

You can enter a location to be associated with this academic program for the student. If the standard program was defined with only one location, that location defaults into this field. If the program has multiple locations, you can choose a location. If the program has no locations listed, you can choose from all locations, or leave it blank.

Procedure for Evaluating a Proposed Student Program

Complete the steps listed below to propose a student program.



Note: In WebAdvisor, students and advisors can perform a what-if analysis using the Program Evaluation workflow. For more information, see *WebAdvisor Installation and Administration*.

Step 1. Access the student on the Proposed Student Program (PSPR) form.

Step 2. Enter the proposed academic program.

The administrative information for the program is displayed in the top section of the form.

A message is displayed if you select a program already assigned to the student, but Colleague allows you to continue to evaluate or customize the program.

Step 3. Use the Evaluate field to evaluate a student's academic records as they apply to the selected academic program.

From this field, you access the Evaluation (EVAL) form. Refer to [Understanding Student Evaluations on page 114](#) for more information about using the EVAL form.

Step 4. Use the Program Customization field to customize the selected academic program for the student.

From this field, you access the PGM Evaluation/Customization (PGEC) form. Refer to [Adding a Custom Requirement on page 62](#) and [Understanding Exceptions on page 68](#) for additional information on customizing a student's program.

Step 5. If you want to save this academic program and assign it to the student with a preliminary status, enter **Y** in the Save Current Program field.



Note: You cannot use this field to assign an academic program to an applicant. Use the appropriate form from the Admissions module to change an application's academic program.

Step 6. Use the Location field to associate the program with a specific location.

Step 7. Finish from the PSPR form.

Running Academic Evaluations

In This Chapter

This chapter describes how to format and produce an evaluation of an individual student's academic activity as it is applied to a chosen academic program. It is not necessary for the academic program to be currently assigned to the student in order to run an evaluation for it. Refer to [Performing a What-If Analysis on page 103](#) for more information. [Table 17](#) lists the topics covered in this chapter.

Table 17: Topics in This Chapter

Topic	Page
Understanding Student Evaluations	114
Parts of an Academic Evaluation	116
Running Individual Evaluations	123
Running Batch Evaluations	126
Running Academic Evaluations for Proposed Programs	130
HTML Student Evaluation Reports	133

Before You Begin

Before you begin, you should have a basic understanding of how academic programs and requirements are defined, in addition to some knowledge about academic records. See [Procedures for Defining an Academic Program on page 34](#) and [Academic Requirement Hierarchical Structure on page 30](#) for information about setting up academic programs and requirements. Refer to the *Using Academic Records* manual for detailed information about student academic activity.

Understanding Student Evaluations

An academic evaluation is a comparison of the student’s academic activity to the requirements (including subrequirements and groups) of the academic program in which the student is enrolled. An evaluation can be viewed online and subsequently printed if a hard copy is also desired. The appearance of the evaluation is totally dependent on how your institution chooses to define your academic programs and requirements. By the time you run an evaluation, most of the decisions about its appearance will have already been made. You can, however, make limited changes at the time the evaluation is run. See [Procedure for Running & Printing Individual Academic Evaluations on page 125](#) for more information about changing runtime parameters for an evaluation.

Figure 23: Example of an Academic Evaluation

```

12/07/05                               Datatel University                               Page 1
                                         Academic Evaluation
-----
Student.....: Mr. Adam Ashley (0000937)
Program.....: Bachelor of Arts in Liberal Arts (LIBARTS.KEH)
Catalog.....: 2003
Ant Completion Date: 05/07
E-Mail Address.....: ashleya@datatel.edu
-----

*****
Advisor(s):
*****
Program Status: In Progress

          Current.....  Anticipated(*).....
          Required  Earned  Remaining  Additional  Remaining
Institutional Credits:  120.00   9.00   111.00     6.00     105.00
Institutional GPA....:   3.000   3.333         Met
Combined Credits:     120.00  12.00   108.00    19.00     89.00
Combined GPA.....:     3.000   3.333         Met
|
(*) Anticipates completion of in-progress and registered and planned courses
=====
Statuses: W=waived, C=Complete, I=In progress, N=Not started
P=Pending completion of unfinished activity
=====

```

Student Academic Activity

A student's academic activity can include any or all of the following types of courses:

- Courses completed at your institution.
- Courses in-progress at your institution (for which the student is registered).
- Future courses at your institution (for which the student is pre-registered).
- Transfer courses from other institutions.
- Future courses that have been planned in WebAdvisor Student Educational Planning or Student Course Planning.
- Noncourses such as tests (achievement, CLEP, etc.) or life experiences. To apply such items to a student's academic program, they must be defined as noncourses and equated to credit using the Noncourses (NONC) form. Refer to the *Using Recruitment/Admissions Management* manual for more information about setting up noncourses.

Most academic activity (all except planned courses) is stored in one file in Colleague called the STUDENT.ACAD.CRED file, which is essentially the transcript file. Transcript activity comes from multiple places within Colleague: institutional courses through Colleague Registration, manual entry of courses through Colleague Academic Records and courses from conversion programs when implementing Colleague. In addition, transfer courses and noncourse credits are obtained from Colleague Admissions/Recruitment Management.

Data about planned courses is stored in the STUDENT.PLAN.STUDIES and the STUDENT.ED.PLANS files. Planned course information comes from Student Course Planning and Student Educational Planning.

Academic Programs

An academic program outlines the course of study that a student needs to pursue an academic goal at your institution. The academic program consists of two distinct parts: an administrative profile and an academic requirement.

The administrative part is required to implement Colleague Student, and is defined in Colleague Curriculum Management. It includes such items as the degree, major, minor, specialization, certificate, credential, or diploma. Refer to the *Using Curriculum Management* manual for more information about setting up your institution's academic programs.

The academic requirement part of the academic program includes the number of credits required to complete the degree as well as the required grade point average (GPA). In addition, it lists the names of specific requirements the student must complete in order to obtain the degree. Requirements are like building blocks, and can be added to any number of programs.

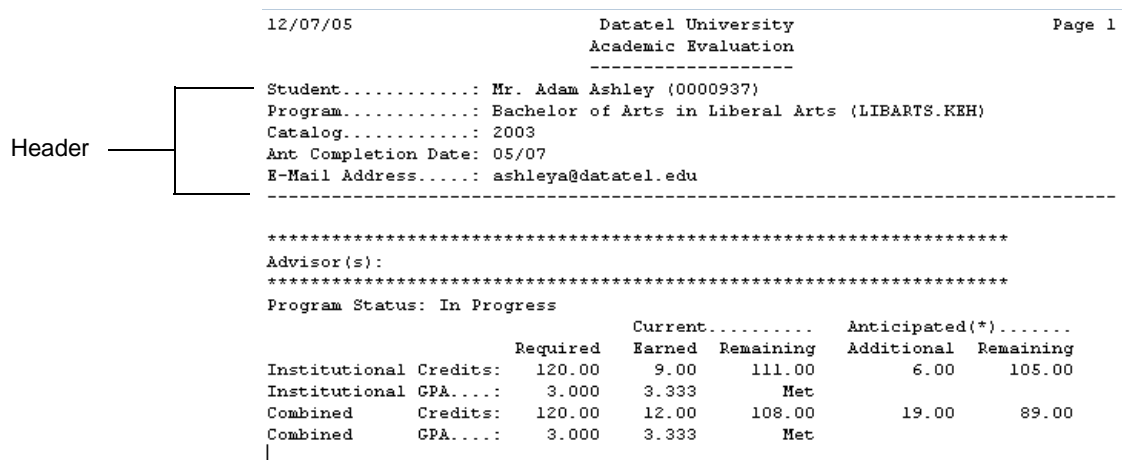
Parts of an Academic Evaluation

An academic evaluation is comprised of several distinct parts including the following:

- Header
- Top custom paragraph
- Program information block
- Evaluation results
- Other courses
- Bottom custom paragraph
- Notes

Each of these parts is discussed in greater detail on the following pages.

Figure 24: Academic Evaluation - Header



Header

The header part of the evaluation is system-generated and contains basic information about the student being evaluated (student name, academic program name, etc.). Colleague uses the S.FORMAT.DA.HEADER print routine to obtain this information.

Top Custom Paragraph

You can design custom paragraphs that use merge variables from the PERSON file with your own text, and insert those into your evaluations. Custom paragraphs are defined using the Degree Audit Custom Paragraphs (DACP) form. From this form, you can also access the Rules Definition (RLDE) form to write rules used to determine the conditions under which the paragraph is printed.

You can elect to print a custom paragraph at the top of the evaluation and at the bottom. Your institution may want to use the top paragraph to display advisor information for a student, and use the bottom paragraph as a signature block to be signed and dated by the student and advisor.

If the HTML report option is your default formatting choice, the custom paragraphs will be automatically separated by lines, so there will be no need to use special characters (such as an asterisk) to separate them.



Technical Tip: Under HTML formatting, adding a tilde (~) character will force a new line.

Figure 25: Academic Evaluation - Program Information

12/07/05	Datatel University Academic Evaluation	Page 1				

Student.....	Mr. Adam Ashley (0000937)					
Program.....	Bachelor of Arts in Liberal Arts (LIBARTS.KEH)					
Catalog.....	2003					
Ant Completion Date:	05/07					
E-Mail Address.....	ashleya@datatel.edu					

Advisor(s):						

Program Status: In Progress						
Program Information		Current.....	Anticipated(*).....			
		Earned	Remaining			
		Additional	Remaining			
	Institutional Credits:	120.00	9.00	111.00	6.00	105.00
	Institutional GPA....:	3.000	3.333	Met		
Combined Credits:	120.00	12.00	108.00	19.00	89.00	
Combined GPA....:	3.000	3.333	Met			
(*) Anticipates completion of in-progress and registered and planned courses						
=====						
Statuses: W=waived, C=Complete, I=In progress, N=Not started						
P=Pending completion of unfinished activity						
=====						

Program Information

The program information block displays the status of the overall program, such as waived, complete, in-progress, not started, and pending (completion of unfinished activity). It shows the number of credits and GPA required both at your institution, as well as the number of overall credits and GPA (including credits earned from transfer courses, noncourses, etc.) required to obtain the degree. These requirements are defined for an academic program on the Academic Program Requirements (APRS) form.

In addition to the academic program's credit and GPA requirements, the student's current credit status (credits earned and credits remaining) and GPA are displayed. Any courses in which the student is currently enrolled or for which the student is registered are displayed as anticipated credits.

Anticipated credits are displayed only if the evaluation is run with in-progress and/or future courses included. Planned courses are displayed only if the evaluation is run with planned courses included.

Figure 26: Academic]Evaluation - Evaluation Results

```

-----
I) 1: Fine Arts Major Requirements
Credits: 16
Complete all 8 subrequirements:
C) A: English
  > Take 6 credits from the department of English
!! Exception
  Take 3 credits from the department of English

      ENGL-102..... 2004/FA  C      3
      engl-101_____ 2004/fa  a  <   3> *n/a *E
      engl-100_____ 2004/fa  a  <   3> *n/a *E

P) E: Math
  > Take 6 credits from the department of Math
Credits: 6
      MATH-101..... 12/17/04 --- (    3) *PTE
      MATH-201..... 2002/SP  ___ (    3) *IP
      math-099_____          (    3) *n/a *E *PL

C) C: History
  > Take History 101 and History 102
!! Exception
  Take History 102

      HIST-102..... 08/19/05 ---      3 *TE

N) D: Physical Education
  > Take 2 courses from the department of Physical Education
      _____ 1 course needed
      _____ 1 course needed
      _____ 1 course needed

I) E: Upper Level Business
  
```

Evaluation Results

The main body of the evaluation lists each requirement, subrequirement, and group associated with the academic program, as well as how the student's academic activity has been applied by Colleague to these requirements. The requirements are displayed in outline format, and appear in the order in which they were entered on the APRS form. For example, if you define the AS.ACCT program with the general education requirement listed first, the general education requirements and subrequirements are the first items displayed in this section of the evaluation.



Note: When you run an evaluation, you cannot change the order in which requirements are displayed. When implementing Colleague, your institution should give thorough consideration to the order in which you want your requirements, subrequirements, and groups displayed on the evaluation prior to defining your academic programs. See [Defining a New Academic Program on page 25](#) for detailed information about setting up your academic programs and requirements.

Each requirement entered for an academic program is displayed as a separate block on the evaluation. Depending on how your institution has defined the requirements, subrequirements, and groups for an academic program (see note above), a program may list several requirements with multiple subrequirements. For example, a program may include a general education requirement containing several subrequirements such as communications, social sciences, and math; or the program may be defined with multiple requirements instead. For example, a program may have separate requirements for communications, social sciences, and math.



Note: As you define your academic programs, you should pay careful attention to their effect on the appearance of your evaluation to ensure they are meaningful and easy to understand.

Parts of Evaluation Results

The evaluation results block of an evaluation includes the following information:

- **Requirements** are displayed as separate blocks and are numbered sequentially. The number of required credits as well as the required grade point average (GPA) are displayed along with the student's GPA.
- **Subrequirements** are displayed within their associated requirements and are lettered sequentially. The print text lists the details of the subrequirement.
- **Groups** are displayed within their associated subrequirements. The print phrases from the Specification field on the SRSP form show a description of the group. If the student has completed any of the courses in the group, the term in which they were taken along with the grade and number of credits earned are displayed.

Figure 27: Academic Evaluation - Other Courses and Notes

```

=====
OTHER COURSES:
Registered   Earned
Credits      Credits
ACCT*456..... 11/07/01 B   3.00 ( 3.00) *INC
*.....       03/20/02   3.00   3.00 *TE
ACCT*456..... 02/SU   F   3.00   0.00
ACCT*456..... 03/SP   A   3.00   3.00
ACCT*101..... 03/SP   B   4.00 ( 0.00) *INC *RP
COE*441..... 03/FA   W   3.00   0.00 *G
ACCT*100..... 03/FA   D   3.00   0.00
CS*189.....   04/SP   C   3.00   3.00
ACCT*100..... 04/SP   B   3.00   0.00
JYP*1234..... 04/SP   B   3.00   0.00
MATH*818..... 04/SU   C   3.00   3.00
MATH*101..... 04/SU   A   1.00   1.00
ACCT*101..... 05/SP   D   4.00 ( 4.00) *IP
CHEM*100..... 05/SP   D   3.00 ( 3.00) *IP
CHEM*121.....           ( 3.00) planned *PL
CHEM*101..... 05/SP   D   ( 3.00) planned *PL
(Credits in parentheses are anticipated earned)
=====

NOTES

*E   Extra - Either this course is not needed to complete this
      requirement, or else applying it would not have contributed anything
      toward the requirement's completion
*F   Forced - course was manually applied (Override)
*G   Grade - course failed the minimum grade requirement
*INC  Incomplete grade
*IP   In Progress
*n/a  Not applied to this component of the program
*NE   Non-course Equivalency
*PL   Planned - not yet registered.
*PLD  Planned under a different requirement, but evaluation applied it
      here. Not yet registered.
*PLR  Planned under this requirement - not yet registered.
*R    Replaced - This instance of the course has been replaced
*RP   Replacement pending - course is being repeated
*S    Status - Items with this status may not be applied to the program
  
```

Other Courses

This section displays courses that were selected for this transcript grouping but were not used because they did not meet the program's minimum grade specifications, or they were considered to be excess courses.

Bottom Custom Paragraph

The bottom custom paragraph comes from the second field on the Degree Audit Custom Paragraph (DACP) form, as explained on [page 116](#).

Notes

This section contains any additional notes as referenced throughout the evaluation.

Running Individual Evaluations

Use the Evaluate Student Program (EVAL) form to run an evaluation for an individual student. You can also run evaluations for a group of students by using the Batch Academic Evaluation (BEVL) form. This form can be accessed directly from the menu prompt or from numerous forms in Degree Audit. An example of the EVAL form is shown in [Figure 28](#).



Note: Students and advisors can also run an evaluation in WebAdvisor using Program Evaluation. For more information, see the *WebAdvisor for Colleague Student* manual.

Figure 28: The Evaluation (EVAL) Form

The screenshot shows the 'EVAL-Evaluate Student Program' form. At the top, there are two tabs: 'PSPR-Proposed Student Program' and 'EVAL-Evaluate Student Program'. The main content area has a blue header with the following information:

- Smith Jr., Mr. Alex L. ID: 1053475 SSN: 555-99-1212
- Fairfax VA 22033
- Program: Master of Arts in Spanish
- MA.SPAN Catalog: 2006

Below the header, there are several configuration options:

- Include Code/Cutoff Date: A All (includes planned)
- Format: 1 Single-column Report
- Related Courses Policy: N Not Displayed
- Always Show Extra Courses: No
- Ignored Statuses:
 - 1 X Deleted
 - 2 C Cancelled
 - 3

While the format of the evaluation is mainly dependent on how you define your academic programs and requirements, Colleague does allow you to change a limited number of parameters at the time you run an evaluation.

Noteworthy Fields on the EVAL Form

The following fields are particularly useful when running an evaluation for a student.

Include Code/Cutoff Date

Use this field to include codes to be used. You can choose to include only completed courses, in-progress courses, registered/preregistered courses, all courses including planned, or courses completed by a specified date.

Format

Use this field to indicate whether to display the evaluation in one or two columns, or as an HTML document. Use the Academic Evaluation Defaults (AEDF) form if you want to set the HTML report format as the default format.

Related Courses Policy

Use this field to indicate how you want to handle activity deemed “related” but not applied to a requirement (for example, a repeated or replaced course). You can choose to display them along with the applied courses, together in a footnote, or not display them at all.

Always Show Extra Courses

If your format has been set up to show extra courses, this field is not necessary. However, if your format has not been set up to do this, you can enter a **Y** here to override that setting. If you enter **Y** here, you must also set up the Related Courses Policy field to display extra course work.

Ignored Statuses

Use this field to indicate the status of courses you do not want displayed on the evaluation, such as cancelled or deleted.

Procedure for Running & Printing Individual Academic Evaluations

Familiarize yourself with the way in which your institution has defined your academic programs and requirements.

Step 1. Access the Evaluation Student Program (EVAL) form for the student and academic program you want evaluated.

Step 2. Enter any additional selection criteria.

Step 3. Finish from the form.

Step 4. After the evaluation is displayed on the form, you can scroll through it using the browser.

Step 5. If you want to print the evaluation, select the “print” option to enter the name of the printer you want to use.

Step 6. Finish from the form.

Running Batch Evaluations

Use the Batch Academic Evaluation (BEVL) form to produce academic evaluations in batch. An evaluation report is produced for each student program record selected.

The BEVL process also updates the GRADUATES file's status field if you specify on this form that this is what you want, and if the individual has a GRADUATES file record on file (which indicates that the individual has applied for graduation).

The fields on this form are divided into two sections:

- While the format of the evaluation is mainly dependent on how you define your academic programs and requirements, Colleague does allow you to change a limited number of parameters at the time you run an evaluation. The upper section of the form lets you specify those parameters. You can also specify whether to update the GRADUATES file.
- The lower section lets you specify which student programs to evaluate. This can be specified with a saved list, additional selection criteria, or specific student programs.

Figure 29: The Batch Academic Evaluation (BEVL) Form

BEVL-Batch Academic Evaluation

Include: A

Report Format: 1 Single-column Report

Related Courses Policy: N Not Displayed

Always Show Extra Courses: No

Ignored Statuses: 1 X Deleted, 2 C Cancelled, 3

Update Graduates file: No

Saved List Name: _____

Student	Programs
1	
2	
3	
4	
5	
6	
7	

Additional Selection Criteria: No

Noteworthy Fields on the BEVL Form

The following fields are particularly useful when producing a batch of academic evaluations.

Include

Use this field to include codes to be used. You can choose to include only completed courses, in-progress courses, registered/preregistered courses, all courses including planned, or courses completed by a specified date.

Report Format

Use this field to indicate whether to display the evaluation in one or two columns, or as an HTML document. Use the Academic Evaluation Defaults (AEDF) form if you want to set the HTML report format as the default format.

Related Courses Policy

Use this field to indicate how you want to handle activity deemed “related” but not applied to a requirement (for example, a repeated or replaced course). You can choose to display them along with the applied courses, together in a footnote, or not display them at all.

Always Show Extra Courses

If your format has been set up to show extra courses, this field is not necessary. However, if your format has not been set up to do this, you can enter a **Y** here to override that setting. If you enter **Y** here, you must also set up the Related Courses Policy field to display extra course work.

Ignored Statuses

Use this field to indicate the status of courses you do not want displayed on the evaluation, such as cancelled or deleted.

Update Graduates File

If you set this field to **Y**, then Colleague updates the graduates file with Complete, if the program evaluates to a status of either Complete or Pending. This allows you to process a batch of “about to graduate” students before the last term is actually over.

If you use an include code of I (or a code of D with a cutoff date of the end of current term,) then Colleague marks Complete in the graduates file even those students who have not yet completed the requirements but who are anticipated to complete them by the end of the current term.

If you want records of only actual complete students to be updated in the graduates file, then use an include code of C (only completed courses may be applied).

Student Programs Group

When you enter a student or applicant (or select one from the Person Resolution screen after using Person LookUp), the Academic Programs Resolution screen appears displaying the academic programs associated with the student or applicant. You can select the academic program you want included in the report. If you want to evaluate more than one of the student's programs, use multiple rows of the group.

Procedure for Running and Printing Batch Academic Evaluations

Before you run and print batch academic evaluations, familiarize yourself with the way your institution has defined academic programs and requirements.

Step 1. Access the Batch Academic Evaluation (BEVL) form.

Step 2. Specify the evaluation format parameters in the upper part of the form.

Step 3. Specify items to be included in the evaluation in the lower part of the form.

Step 4. Save from the form.

Step 5. When the evaluation is displayed, you can scroll through it.

Step 6. If you want to print the evaluation, select the “print” option to enter the name of the printer you want to use.

Step 7. Finish from the form.

Running Academic Evaluations for Proposed Programs

Use the Batch Proposed Program (BPRP) process to produce academic evaluations for proposed programs in batch. An evaluation report is produced for each student selected.

The fields in the top portion of the form allow you to specify how the evaluations are to be run and formatted.

The fields in the lower portion of the form allow you to specify which student you want to evaluate. You can select a student by specifying a saved list, or by selecting specific students.

Figure 30: Batch Proposed Program (BPRP) Form

BPRP-Batch Proposed Program

Acad Program: MADENGL Master of Arts in Englis Catalog: DR

Include: A All (includes planned)

Report Format: 1 Single-column Report

Related Courses Policy: N Not Displayed

Always Show Extra Courses: No

Ignored Statuses: 1 X Deleted, 2 C Cancelled, 3

Saved List Name: IART_MCD_49079_14957

Students

1	
2	
3	
4	
5	
6	
7	

Noteworthy Fields on the BPRP Form

The following fields are particularly useful when producing a batch of academic evaluations for a proposed program.

Include

The code you enter in this field is used to determine which courses the degree audit evaluator includes. Select a code before running an evaluation, or accept the code that defaults from the Acad Evaluation Defaults (AEDF) form.

Report Format

Use this field to specify whether you want to format the report in single column, double column, or HTML.

If the HTML Report option is chosen, an HTML document will be generated based on the customizable style sheet from the application listener, saved to your local computer, and opened by your default browser. Note that with this option, the rendering and printing of the document depends on the browser. This option is optimized for Internet Explorer 7 and later.

Related Courses Policy

Related activity are courses and credits that are not applied to a requirement but are somehow related to it and which may be of interest to an advisor when reviewing the evaluation.

Always Show Extra Courses

Enter Yes if your system is currently set up so that extra course work does not appear on the evaluation report but you want to override that setting. This option forces the extra work to be displayed. If your system is already set up to show extra courses, then this field is ignored. However, if your system currently does not show extra course work on the report, then set this field to “Yes” to force extra courses to show up as “related” courses.

Ignored Statuses

Enter credit statuses that you do not want to display on the evaluation.

Procedure for Running and Printing Batch Academic Evaluations for a Proposed Program

Before you run and print batch academic evaluations for a proposed program, familiarize yourself with the way your institution has defined academic programs and requirements.

- Step 1.** Access the Batch Proposed Program (BPRP) form.
- Step 2.** At the Lookup prompt, specify the Academic Program and Catalog.
- Step 3.** Specify the evaluation format parameters in the upper part of the form.
- Step 4.** Specify students to be included in the evaluation in the lower part of the form.
- Step 5.** Save from the form.
- Step 6.** When the evaluation is displayed, you can scroll through it.
- Step 7.** If you want to print the evaluation, select the “print” option to enter the name of the printer you want to use.
- Step 8.** Finish from the form.

HTML Student Evaluation Reports

You can use the Format field on the EVAL or BEVL form to indicate if an evaluation is displayed as an HTML document.

You can also use the Academic Evaluation Defaults (AEDF) form to set the HTML report format as the default format.

Viewing HTML Reports

You can use the HTML option to display a Degree Audit using your default browser. To view the report with this format, choose H for HTML report from the EVAL or BEVL forms. After you save from the form, an HTML document is saved to your computer and automatically launched by your default internet browser. There will also be a notification window which when closed, will trigger the deletion of that HTML file from your computer. Close this window only when you are done viewing the report.

On the BEVL form, if more than one student is included on the HTML report, an index is added to the top of the page, which provides direct links to each student on that page. There may be more than one HTML files created if the number of students reported is very large. Previous and Next links allow you to browse through the files.

You can additionally customize the layout of the HTML Degree Audit report. Refer to the Appendix for more information.



ALERT! Before the HTML report option will work properly in UI Web, a UI Web Server Listener must be defined on the UI Web Admin Parameters (UWPR) form. Otherwise, the generated HTML file will not be copied from HOLD to your local computer for viewing.



Technical Tip: When running a batch report on a large number of records with the BEVL process, the FTP file transfer option should be turned on for faster processing. This option can be set on the UI Administration Parameters (UIPR) form.

Printing HTML Reports

Printing of the HTML report is handled by the browser. Print the HTML report as you would any web page from your browser. There are page breaks on each student so that each record will start on a new page when printed.



Note: Page breaks are not supported by Mozilla's Firefox.

By default, background color printing is mostly likely disabled on your default browser.

Procedure for Turning On Background Color Printing in Internet Explorer

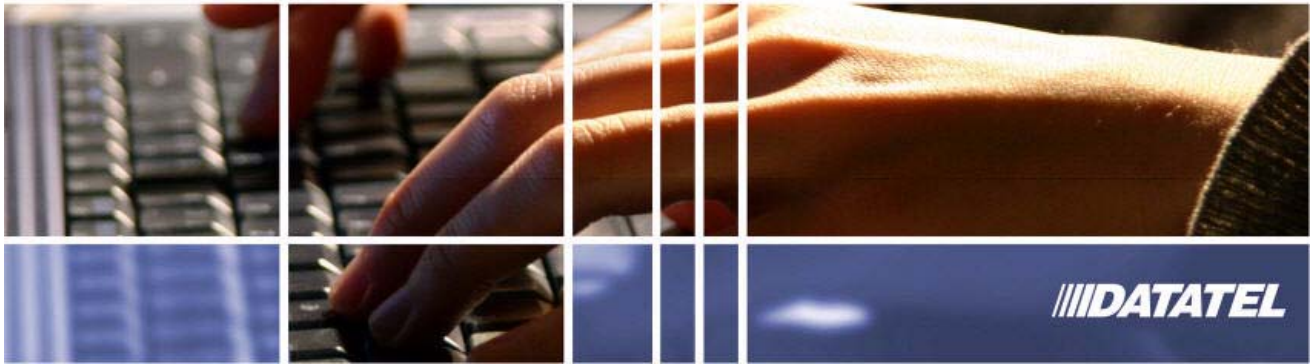
To turn on background color printing, do the following:

- Step 1.** From the Tool menu, select Internet Options, then the Advanced tab.
- Step 2.** Check the Print Background Colors and Images box.
- Step 3.** Save your changes.

Procedure for Turning On Background Color Printing in Firefox

To turn on background color printing, do the following:

- Step 1.** From the File menu, select Page Setup.
- Step 2.** Check the Print Background (Colors and Images) box.
- Step 3.** Save your changes.



Using Degree Audit

Appendices

Degree Audit Syntax

Understanding Degree Audit Syntax

A subrequirement specification consists of one or more groups. Each group specifies something that the student must complete. A group is specified by combining one or more of the phrases listed below. If a specification consists of multiple groups, you must identify each group with a pound sign (#). If you create only one group, the pound sign is optional.



Note: In the course planning wizard in WebAdvisor groups are called components.

If you specify more than one group, the student must complete each group unless the specification begins with a TAKE x GROUPS phrase.

If the specification that you enter contains a course name that is not unique, Colleague displays a message and then displays a course resolution form that requires you to choose the course that you intended to specify.

If the specification is being made for the first time, and the Print Text field is empty, Colleague copies the text from the Specification field into the Print Text field in the printed text window. If print text already exists, Colleague does not overwrite it, even if you have made changes to the specification text.

In general then, a specification takes one of the following three forms:

A Single Group

An example of this type is:

**Take 3 credits; from department math;
At level 300,400**

Another example is:

Take ART*200

Multiple Groups, all of which are required

An example of this type is:

**# Take 3 credits; from department math;
At level 300,400
Take 3 credits; from subject science;
Except NATSCI*100, NATSCI*101**

Multiple Groups, from which 1 or more must be selected

An example of this type is:

**Take 1 Group
Take 3 credits; from department math;
At level 300,400
Take 3 credits; from subject science;
Except NATSCI*100, NATSCI*101**

Additional Rules, Notes and Tips:

1. The system is not case sensitive; you may use upper, lower, or mixed case.
2. You must separate one phrase from the next with a semicolon (;). The semicolon is optional after the last phrase of a group (if the next character is a # or when at the end).



Note: Most errors arise from not using a semicolon.

3. You can use as many lines as needed when specifying a phrase. The phrase does not end until it hits a semicolon, a pound sign (“#”), or the end of the specification.
4. The word TAKE is *always* optional. Thus:
MATH*100, MATH*110 is the same as TAKE MATH*100, MATH*110
5. Members of a list, such as in lists of courses, departments, or levels, must be separated by one or more “spacers.” The following act like spacers: a comma, a space, the end of the line.
6. Extra spacing, including extra blank lines, is ignored.
7. Colleague sees plural words as synonyms of singular ones. Thus, TAKE 5 COURSES, TAKE 5 COURSE, and TAKE 1 COURSES are all understood.
8. To allow for more natural construction, the system bends its rules in a very small number of common situations. For example:

Table 18: Natural Construction Rules

single phrase...	can be used instead of...
Take 5 courses of MATH	Take 5 courses; From department MATH
TAKE 12 credits from the math department	TAKE 12 credits; from department math

If in doubt about what will work, use the formal syntax.

9. Colleague ignores the words AND and OR. For example:

Table 19: Ignoring AND and OR in Phrases

the phrase...	is identical to...
From departments Math, Bio	From departments Math or Bio From departments Math and Bio

However, Colleague treats the word OR differently in one specific instance. When a list of two or more courses in a TAKE phrase ends such that the last connector is an OR, then the phrase is interpreted as “Take 1 of the

following courses...” For example,

Take Math*100, Math*200, Math*300

is identical to

Take Math*100, Math*200 AND Math*300

Both phrases mean “take all three courses.” However,

Take Math*100, Math*200 OR Math*300”

is different. This phrase is identical to the following two-phrase combination:

Take 1 course; from Math*100, Math*200, Math*300

How to Build a Group

A group consists of combinations of the following phrases:



Note: The phrases are shown in the form of examples. For clarity, some of the examples include words enclosed in angle brackets, such as <of the following>. These words are not part of the phrase and should not be entered unless your system administrator defined them as ignored words. Also, your system administrator may define synonyms for you to use (such as CREDIT for HOUR or AREA for DEPARTMENT).

TAKE Phrases

TAKE math*100, engl*110, bio*120;

TAKE math*100, engl*110 OR chem*222;

TAKE 2 <of the following> COURSES: math*100, engl*110, bio*120;

TAKE 5 HOURS;

TAKE 5 COURSES;

TAKE 5 math,bio,chem COURSES;

TAKE 5 300,400 LEVEL COURSES;

CUSTOM.MATCH “humanities”; (This phrase requires a programmer to write a custom program.)



Note: You must include 1 (and only 1) TAKE phrase in each group.

Selection Phrases

FROM <the> DEPARTMENTS <of> math,bio,chem;

FROM <the> math,bio,chem DEPARTMENTS;

FROM math*100, engl*110, bio*120;

FROM LEVELS 300,400;

FROM RULE no.old.crses; (the rule must pre-exist)

FROM SUBJECTS philosophy, religion, sociology;

EXCEPT math*100, engl*110, bio*120;

EXCEPT SUBJECTS math,bio,chem;

EXCEPT DEPARTMENTS math,bio,chem;

EXCEPT LEVELS 300,400;

Ceilings

MAXIMUM 5 COURSES;

MAXIMUM 5 SUBJECTS;

MAXIMUM 5 DEPARTMENTS;

MAXIMUM 5 HOURS;

MAXIMUM 5 HOURS PER RULE no.old.crses; (the rule must pre-exist)

MAXIMUM 5 COURSES PER SUBJECT;

MAXIMUM 5 COURSES PER DEPARTMENT;

MAXIMUM 5 100,200 LEVEL COURSES;

MAXIMUM 5 HOURS PER COURSE;

MAXIMUM 5 HOURS PER SUBJECT;

MAXIMUM 5 HOURS PER DEPARTMENT;

MAXIMUM 5 100,200 LEVEL HOURS;

Additional Requirements

MIN GPA 2.5;

MINIMUM 5 HOURS;

MINIMUM 5 INST.HOURS;

MINIMUM 5 COURSES;

MINIMUM 5 SUBJECTS;

MINIMUM 5 DEPARTMENTS;

MINIMUM 5 HOURS PER COURSE;

MINIMUM GRADE <of> c;

MINIMUM GRADE <of> c,au,p;

(The first grade is the minimum; the subsequent grades are the additional grades such as Audit and Pass, which are also permitted.)

The following phrases are not valid unless they are accompanied by the corresponding FROM phrase.

MINIMUM 5 HOURS PER SUBJECT;

MINIMUM 5 HOURS PER DEPARTMENT;

MINIMUM 5 COURSES PER SUBJECT;

MINIMUM 5 COURSES PER DEPARTMENT;

Evaluation Directives

These phrases instruct the system how to do the evaluation of this particular group. All the phrases in this group are very rarely used. They are used to override the default values of the subrequirement. That is, they should be used only when you want the system to treat this particular group differently from other groups in this subrequirement.

IN.LIST.ORDER;

This one-word phrase is used only in conjunction with a group that lists specific courses from which a student must select. For example: TAKE 2 COURSES; FROM CHEM-100 ZOOL-203 BIO-188; IN.LIST.ORDER

The use of the IN.LIST.ORDER phrase directs the system to use the courses in the order listed, disregarding the usual sort order. In the above example this means that if the student had taken all three courses, the system would use CHEM-100 and ZOOL-203, the first two courses listed in the FROM phrase. Because the use of this phrase does force a little extra processing, do not use it unless you find that you need it. Note that even with IN.LIST.ORDER specified, in-progress, other incomplete courses, and planned courses will still be tried last so as not to mark an item Pending or Planned when it should be marked Complete.

EXCLUDE maj;

Used to override the excluded types set at the requirement level. This phrase is used only in DA specifications, never in course prerequisites.

SORTBY bestgrade;

Instructs the system to resort the student's activity (for example, courses) prior to evaluating this group. The word following the keyword SORTBY must be a pre-existing ID on the DA.SORT.SPECS file (which is maintained on the Academic Evaluation Sort Types (AEST) form).

EXTRA_PARAM d;

Instructs Colleague how to handle extra courses. (See the system-wide parameter set on the Academic Evaluation Defaults [AEDF] form.)

GRADE_PARAM y;

Instructs the system how to handle courses which failed the minimum grade specification. Should they be included in the local GPA calculation? The word following the keyword `GRADE_PARAM` must be either a **Y** or an **N**. (See the system-wide parameter set on the AEDF form.)

Other Phrases

The following phrases apply only to Degree Audit, never to course prerequisite specification.

`GROUP.ID 2894;`

This phrase should not be entered by you. The system inserts this phrase into a DA specification after the specification has been successfully analyzed. This phrase identifies the group with its system ID. Do not modify this phrase. Do not delete a `group.ID` phrase unless you are deleting the entire Group to which it belongs. You cannot delete the group ID if there are any exceptions or overrides for that group.

`PRINT "French sequence";`

The `PRINT` phrase is used to specify descriptive text for this one group. This text will appear on the DA evaluation and is used as the component description in WebAdvisor on the Choose a Component form in the course planning wizard. The text must be in quotes and must end on the same line on which it began. However, more than one `PRINT` phrase may be used per group in order to produce a multiline description of the group.

HTML Report Configuration

In This Chapter

This chapter describes how to configure and customize how the HTML Report Format option is used on the EVAL, BEVL and WAPP forms. [Table 20](#) lists the topics covered in this chapter.

Table 20: Topics in This Chapter

Topic	Page
Understanding HTML Report Generation	148

Before You Begin

Before you begin, you should have a basic understanding of the report types are defined. See [Running Academic Evaluations on page 113](#) for information about the report types available on the EVAL and BEVL forms.



Technical Tip: Datatel recommends removing the HTML report option from your production environment until you have tested the functionality. See [Removing and Adding the HTML Report Format Option on page 148](#) for more information.

Understanding HTML Report Generation

When the HTML report format option is selected, an XML document will be produced instead of the plain-text document. The XML document is then sent to the application listener to be transformed to an HTML document using a style sheet, DEGREE-AUDIT.xsl, located in the Trans folder on the listener's server.

In the case of the BEVL form, more than one HTML document may be produced. This is because if the number of records is large enough that the size of the XML document produced exceeds the listener's memory capacity. This XML document will be split into multiple XML documents, which are then individually transformed to HTML documents.

Enabling HTML Report for WebAdvisor and the Portal

To display the HTML report on WebAdvisor and the Portal instead of the plain-text report, select H as the format option on the Web Acad Program Parameters (WAPP) form.

Removing and Adding the HTML Report Format Option

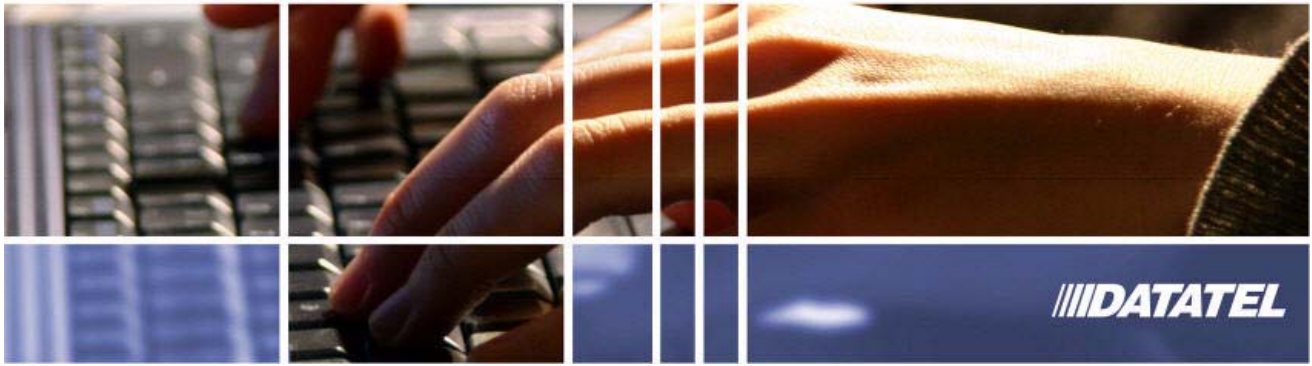
If you want to prevent user access to the HTML report option, delete the third row "H - HTML Report - H" from the ST validation code table DA.REPORT.FORMATS. The HTML report option is then removed from all forms.

You might choose to do this in your production environment until testing and customization of this option is complete.

To re-add the option, add "H - HTML Report - H" to the validation code table.

Customizing the Layout of the HTML Report

To change the layout of the HTML report, the style sheet DEGREE-AUDIT.xsl should be modified. This style sheet is located in the Trans directory on the server where the application listener is installed.



Using Degree Audit

Index

Index

From this index you can click on any entry to access the information about the topic.

A

- Academic Eligibility Rules (ADMR) form 34
- Academic evaluation defaults
 - where used 26
- Academic Evaluation Defaults (AEDF) form 98
- Academic Evaluation Sort Types (AEST) form 98
- Academic program
 - defined 58
- Academic Program Requirements (APRS) form 28, 29, 34, 44
- Academic programs
 - associating honors/rules for achieving honors
 - procedures for 34
 - associating requirements to a program
 - procedures for 34
 - custom 27
 - defining elements 45
 - procedures for defining 34
 - restricting CCDs, majors, minors and specializations used to customize an academic program
 - procedures for 34
 - restricting student eligibility 34
 - standard 27
- Academic Programs (PROG) form 28, 34, 44
- Academic Requirement Copy (ARQC) form 43
- Academic requirement type codes
 - where used 36, 67
- Academic Requirements (REQU) form 39, 43, 48
- Adding a custom requirement 62
 - procedures for 66
 - restrictions 65
 - using Degree Audit syntax 62
- Adding subrequirements
 - to requirements 40
- Addnl Reqmts Print Location (ADPL) form 45
- ADMR form 34
- ADPL form 45
- AEDF form 98

AEST form 98

Allow Additional Courses (EXAC) form 89, 90

Applications (APPN) form 59, 61

APPN form 59, 61

APRS form 28, 29, 34, 44

ARQC form 43

- Associating honors/rules for achieving honors
 - academic programs
 - procedures for 34

- Associating requirements to a program
 - procedures for 34

B

Batch Academic Evaluation (BEVL) form 126

Batch Evaluations 126

C

CCD codes

- where used 26, 36, 57, 97

Change Required - Count (EXCT) form 88

Change Required - Credit (EXCR) form 88

Change Required - Credits (EXCR) form 92

Change Required - GPA (EXGP) form 87, 88

Change Required - Number (EXCT) form 76, 80

Change Required Credits (EXCR) form 72, 93

Change Required GPA (EXGP) form 72, 76, 78, 79

Changing a requirement

- viewing programs affected 41

Codes

ACAD.REQMT.TYPES
where used 36, 67

CCD
where used 26, 36, 57, 97

DEGREE
where used 67

DEPTS
where used 36

GRADES
where used 67

LOCATIONS
where used 26

MAJORS
where used 26, 36, 57, 67, 97

MINORS
where used 26, 36, 57, 67, 97

PROGRAM.STATUSES
where used 26

SPECIALIZATIONS
where used 26, 36, 57, 67, 97

STUDENT.ACAD.CRED
where used 115

STUDENT.ED.PLANS
where used 115

STUDENT.PLAN.STUDIES
where used 115

SUBJECTS
where used 36

TRANSCRIPTS.GROUPINGS
where used 26

Copying existing requirements 43

Course Waivers and Subst (EXCL) form 92, 93

Custom Academic Requirement (QCRS) form 62,
66

Custom programs

adding components 58

adding standard requirements 60

correcting specification errors 64

defined 58

reviewing a student's program 60

viewing requirement information 60

D

Degree Audit syntax
subrequirements and 50

Degree codes
where used 26, 67

DEGREES

where used 26

Department codes
where used 36

E

EVAL form 107, 123

Evaluate Student Program (EVAL) form 107, 123

Evaluations

components of 116

format of 114

overriding evaluator decisions 99

your institution's policies and 99

results 120

running for a student 98, 107

EXAC form 89, 90

EXBR form 76, 85, 89, 90

Exception print text

defining 74

Exceptions

definition 68

granting at the program level 71

requirement-level 76

GPA 76

replacing entire blocks of courses 76

types 68

Exceptions and Overrides (EXOV) form 69, 75, 76,
83, 87

EXCL form 92, 93

EXCR form 72, 88, 92, 93

EXCT form 76, 80, 88

EXGP form 72, 76, 78, 79, 87, 88

EXOV form 69, 75, 76, 83, 87

EXWV form 72, 76, 78, 79, 85, 88, 89, 90, 93

F

Forms

Academic Eligibility Rules (ADMR) 34
 Academic Evaluation Defaults (AEDF) 98
 Academic Evaluation Sort Types (AEST) 98
 Academic Program Requirements (APRS) 28, 29, 34, 44
 Academic Programs (PROG) 28, 34, 44
 Academic Requirement Copy (ARQC) 43
 Academic Requirements (REQU) 39, 43, 48
 Addnl Reqmts Print Location (ADPL) 45
 Allow Additional Courses (EXAC) 89, 90
 Applications (APPN) 59, 61
 Change Required - Count (EXCT) 88
 Change Required - Credit (EXCR) 88
 Change Required - Credits (EXCR) 92
 Change Required - GPA (EXGP) 87, 88
 Change Required - Number (EXCT) 76, 80
 Change Required Credits (EXCR) 72, 93
 Change Required GPA (EXGP) 72, 76, 78, 79
 Course Waivers and Subst (EXCL) 92, 93
 Custom Academic Requirement (QCRS) 62, 66
 Evaluate Student Program (EVAL) 107, 123
 Exceptions and Overrides (EXOV) 69, 75, 76, 83, 87
 Graduate Honors Rules (GHRL) 34
 Pgm Customization/Evaluation (PGEC) 41, 78, 79
 PGM Evaluation/Customization (PGEC) 58, 75, 81, 98
 PGM Evaluation/Customization PGEC) 86
 PGM Evaluation/Customizations (PGEC) 101
 PGM Evaluation/Customization (PGEC) 69
 Program Addnl Restrictions (PRAR) 34
 Program-Level Exceptions (PGEX) 71, 75
 Proposed Student Program (PSPR) 106, 111
 Replace Entire Block (EXBR) 76, 85, 89, 90
 Requirement-Level Exceptions (RQEX) 76
 Requirements (REQU) 60
 Student Academic Program (SACP) 58, 104, 109
 Subreqmt-Level Exceptions (SREX) 87
 Subrequirement Specifications (SRSP) 48, 51
 Subrequirement-Level Exceptions (SREX) 89, 90, 93
 Subrequirements Specifications (SRSP) 40
 Subrqmt-Level Exception (SREX) 83
 Waive (EXWV) 72, 76, 78, 79, 85, 90, 93
 Waiver (EXWV) 88, 89

G

GHRL form 34

Grade codes

where used 67

Graduate Honors Rules (GHRL) form 34

Granting program-level exceptions 71

Group print text

setting up 51

L

Location codes

where used 26

M

Major codes

where used 67

Majors

where used 57

Majors codes

where used 26, 36, 97

Minor codes

where used 67

Minors

where used 57

Minors codes

where used 26, 36, 97

N

Naming requirements 37

P

PGEC form 41, 58, 69, 75, 78, 79, 81, 86, 98, 101

PGEX form 71, 75

Pgm Customization/Evaluation (PGEC) form 41, 78, 79

PGM Evaluation/Customization (PGEC) form 58, 69, 75, 81, 86, 98

PGM Evaluation/Customizations (PGEC) form 101

PRAR form 34

PROG form 28, 34, 44

Program Addnl Restrictions (PRAR) form 34

Program status codes

where used 26

- Program-level exceptions 71
 - institutional credits 71, 72
 - institutional GPA 71, 72
 - overall program credits 71, 72
 - overall program GPA 71, 72
- Program-Level Exceptions (PGEX) form 71, 75
- Proposed Student Program (PSPR) form 106, 111
- PSPR form 106, 111
- Q**
- QCRS form 62, 66
- R**
- Replace Entire Block (EXBR) form 76, 85, 89, 90
- REQU form 39, 43, 48, 60
- Requirement
 - waive 77
- Requirement-level exceptions 76
 - replacing entire blocks of courses 76
 - requirement GPA 76
- Requirement-Level Exceptions (RQEX) form 76
- Requirements
 - adding subrequirements 40
 - copying 43
 - definition 37
 - listing for reporting purposes 40
 - naming 37
 - print order 45
 - replacing 76
 - setting print location for additional program requirements 45
 - standard
 - defined 39
 - viewing programs where used 41
- Requirements (REQU) form 60
- Restricting CCDs, majors, minors and specialization used to customize an academic program
 - procedures for 34
- Reviewing a student's program 60
- RQEX form 76
- Running an evaluation 98
- S**
- SACP form 58, 104, 109
- Specializations
 - where used 57
- Specializations codes
 - where used 26, 36, 67
- Specification errors
 - custom programs 64
- Specifications
 - correcting errors 52
- Specifications codes
 - where used 97
- SREX form 83, 87, 89, 90, 93
- SRSP form 40, 48, 51
- Standard requirements
 - defined 39
- Student Academic Program (SACP) form 58, 104, 109
- Student eligibility
 - academic programs
 - procedures for 34
- Student program
 - checking evaluation status 70
- Subject codes
 - where used 36
- Subreqmt-Level Exceptions (SREX) form 87
- Subrequirement
 - defining 48
- Subrequirement print text
 - setting up 51
- Subrequirement specifications
 - correcting errors 52
- Subrequirement Specifications (SRSP) form 48, 51
- Subrequirement-Level Exceptions (SREX) form 89, 90, 93
- Subrequirements
 - defined 46
 - Degree Audit syntax 50
 - examples 46
- Subrequirements Specifications (SRSP) form 40
- Subrqmt-Level Exception (SREX) form 83
- T**
- Transcript grouping codes
 - where used 26

W

Waive (EXWV) form 72, 76, 78, 79, 85, 90, 93

Waiver (EXWV) form 88, 89

What-If analysis 104

