Course Catalog Setup Guide

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This document is published as a baseline guide. Page shots may reflect campus specific information, provided as examples only. Any questions concerning this document should be addressed to the CMS SA Baseline Student Administration team.

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Section 1 Student Records Setup Description:

PeopleSoft Student Records enables you to enter, track, and process all of your academic information. Once applicants are admitted and matriculate, your Student Records application moves forward to activate, enroll, grade, evaluate, and graduate students. In concert with Academic Advisement processes, your Student Records application tracks students through graduation.

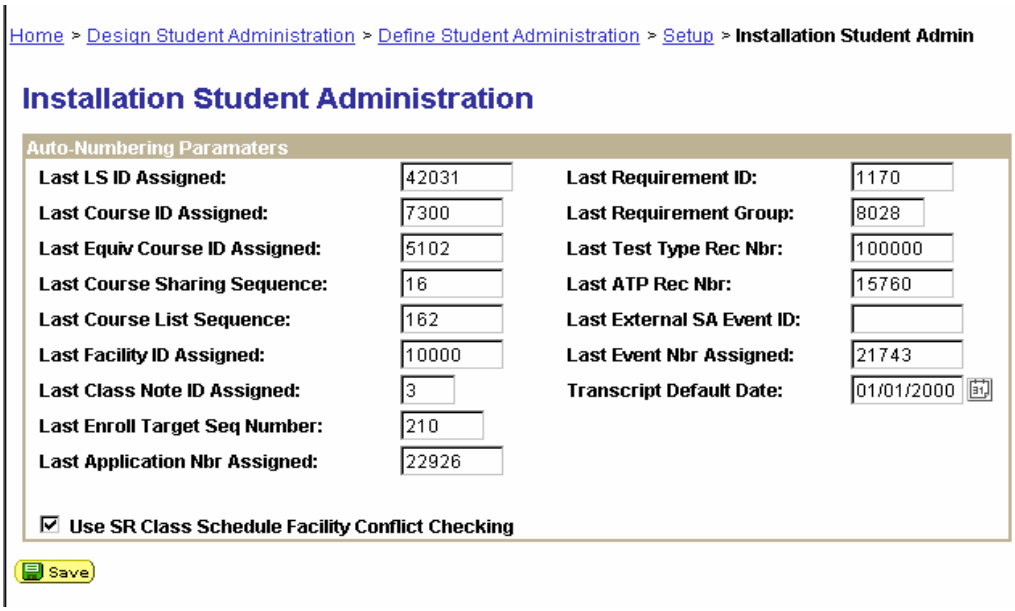
Section 2 Creating Your Course Catalog:

Below is a brief description of the PeopleSoft components used to setup the Student Records module.

2.1 Installation Table

Page Name: Installation Student Admin

Navigation: **Design Student Admin → Define Student Admin → Setup → Installation Student Admin**



Use the **Installation Student Administration** page to set or review start numbers for automatically incremented fields within your Student Administration system. Each of the fields on this page is a field that is automatically incremented throughout the system, such as Course ID, Last Requirement ID, and so on.

2.1.1 Installation Student Administration

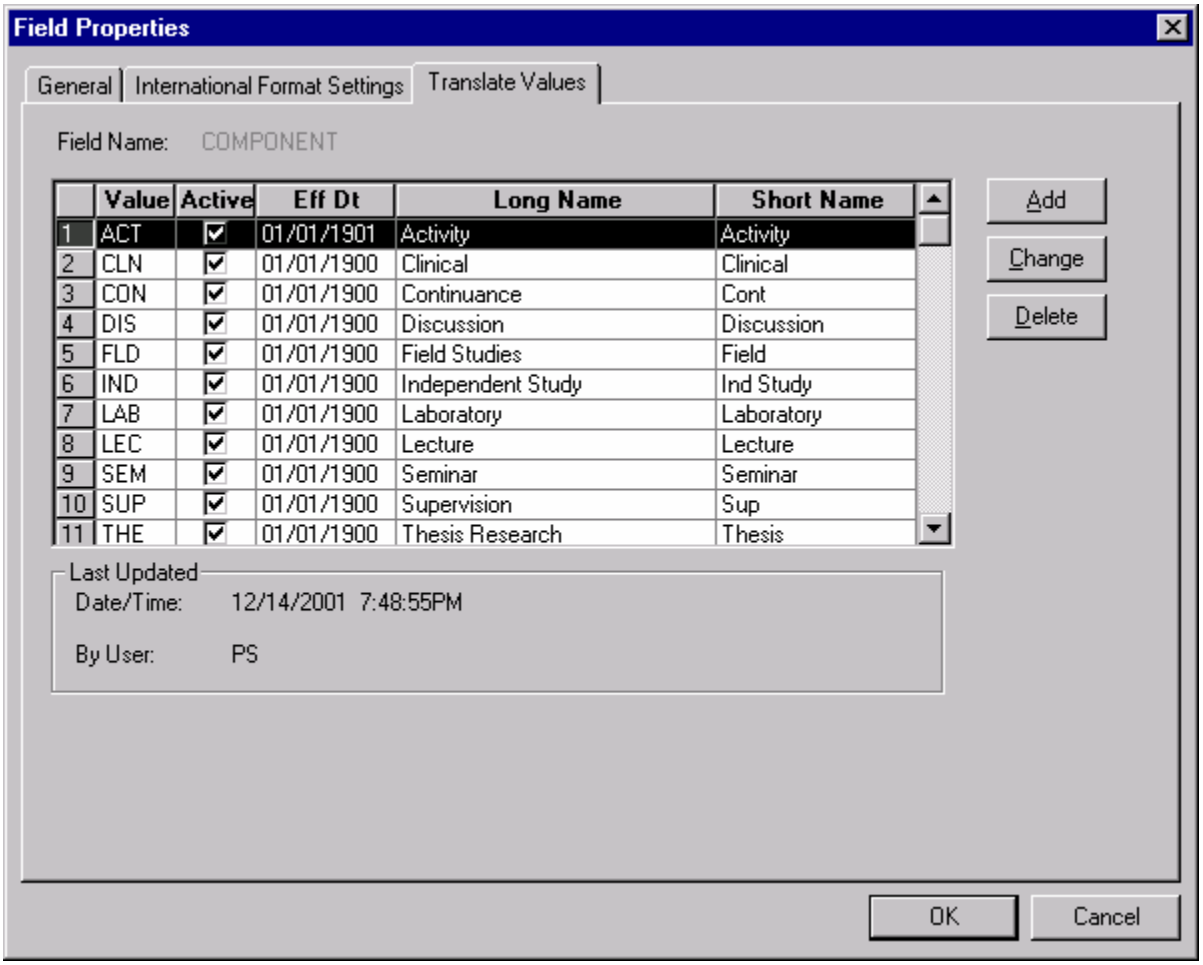
If you want to increment any of these fields to start with a number other than zero you will need to enter that number on this page before you do anything else in the system. Once you have begun converting or entering data and running processes you can come to this page to determine the last number that was incremented for each of the fields listed, but you should not change the numbers.

Recommendations

2.2 Review Component Values

Page Name: Component Values

Navigation: **PeopleTools → Application Designer → Open → Field → COMPONENT→ Review Translates→**



2.2.1 COMPONENT

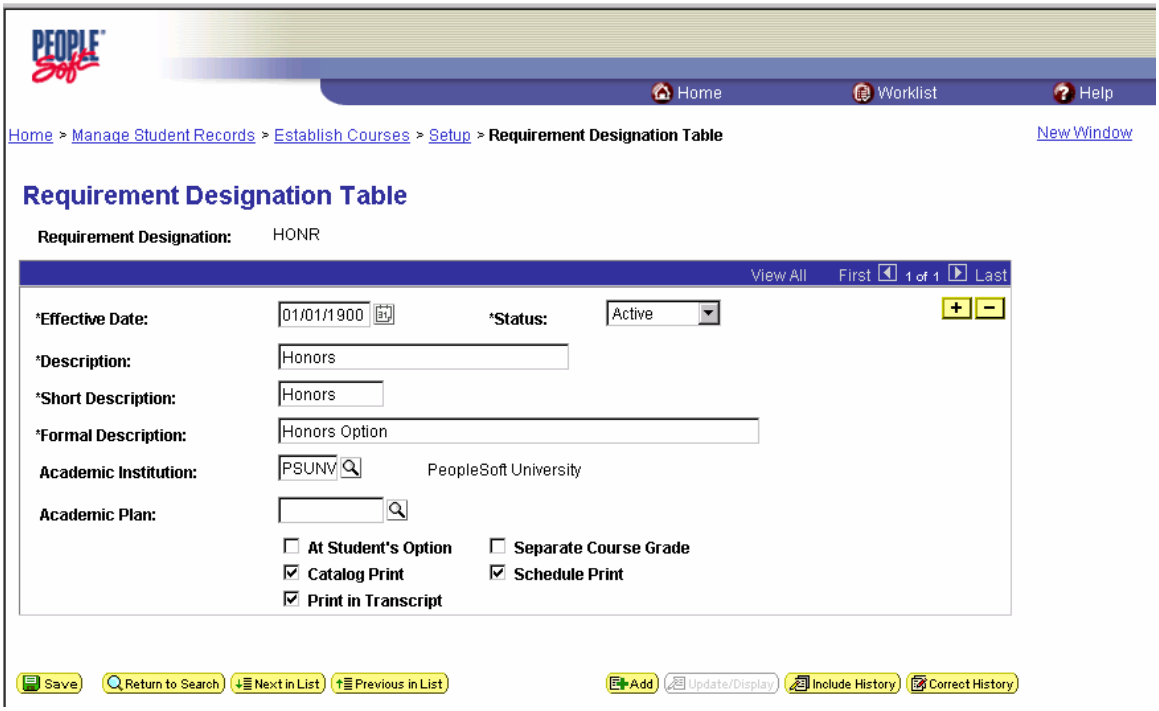
Course Component values are delivered with your system as translate values. You can modify these values. The Course Component indicates the parts of the course offering (lecture, laboratory, seminar) and so on. One course offering can have multiple components. Course Component translates values are located in the CRSE_COMPONENT Record and the COMPONENT field. The value of Activity has added to the system after a request by the Pilot campuses.

Recommendations

2.3 Requirement Designation

Page Name: Requirement Designation Table

Navigation: **Manage Student Records → Establish Courses → Setup → Requirement Designation Table**



Use the **Requirement Designation** Table page to define requirement designations. Requirement designations flow down to Academic Advisement. A Requirement Designation can be extra work that has to be done for a course, such as honors, or a Requirement Designation can specify a category of course to use in a course list for Academic Advisement. For example, you can use a Requirement Designation for all courses that fulfill a writing requirement. Typical requirement designations include Satisfies the Writing Requirement, Honors Requirement, and so on. Requirement designations can be graded as well.

2.3.1 Requirement Designation Table

Select an **Academic Plan** if you wish to link a requirement designation to a specific Plan. At enrollment time, a student must be active in the specified Plan to enroll in any class with that requirement designation. *There are overrides in the Enrollment Request 1 page that would permit you override this general rule as long as you have the appropriate security permissions. Academic Plan values are defined on the Academic Plan Table page.*

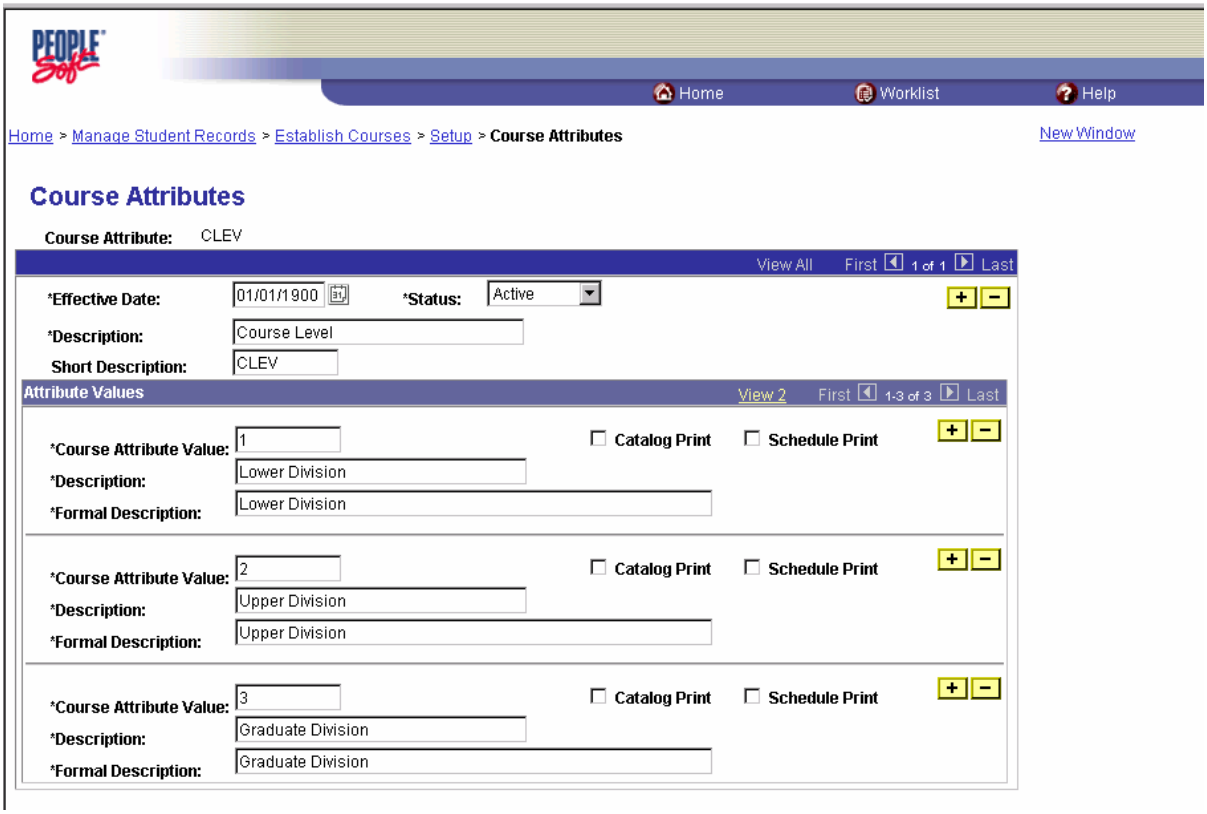
Select the **At Student's Option** to indicate that the Requirement Designation can be chosen by the student. You can indicate a student's choice of Requirement Designation on the Enrollment Request 2 Page or the Student Enrollment 4 page, or the Mass Enrollment Detail 2 page.

Recommendations

2.4 Course Attribute Value

Page Name: Course Attributes

Navigation: **Manage Student Records → Establish Courses → Setup → Course Attributes**



2.4.1 Course Attributes

Use the **Course Attributes** page to define course attributes and attribute values. Course Attributes are used for institutional research purposes, and are used to print repetitive text in the schedule of classes or course catalog such as Offered in Fall Only. Course attributes are attached to courses and classes. Unlike requirement designations, course attributes do not flow down to Academic Advisement.

2.4.2 Attribute Values

The Course/Class attribute table will be required to be filled with values that are both required for the APDB report as well for other uses such as GE Breadth and CAN Number. Each course/class attribute can be selected to print in the catalog or schedule of classes or be selected to not print at all.

Recommendations

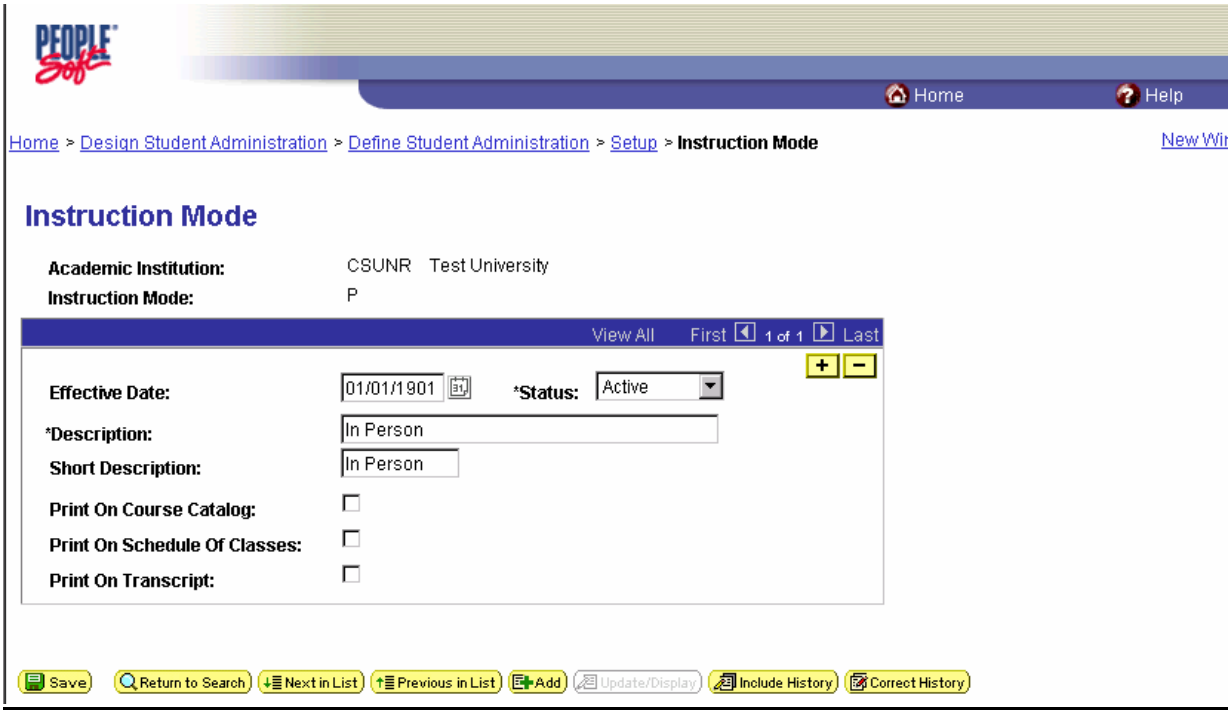
There are multiple values that will be required by the APDB and the ERS reports that will be captured in the Course Attribute field. The following APDB and ERS fields will be captured in the Course Attribute field:

1. **Course Level (Course Catalog Level)**
2. **Course Suffix (Class Schedule Level)**
3. **Course type (Class Schedule Level)**

4. **Service Learning Indicator (Class Schedule Level)**

2.5 Setup Instructional Mode

Navigation: **Design Student Administration → Define Student Administration → Setup → Instruction Mode**



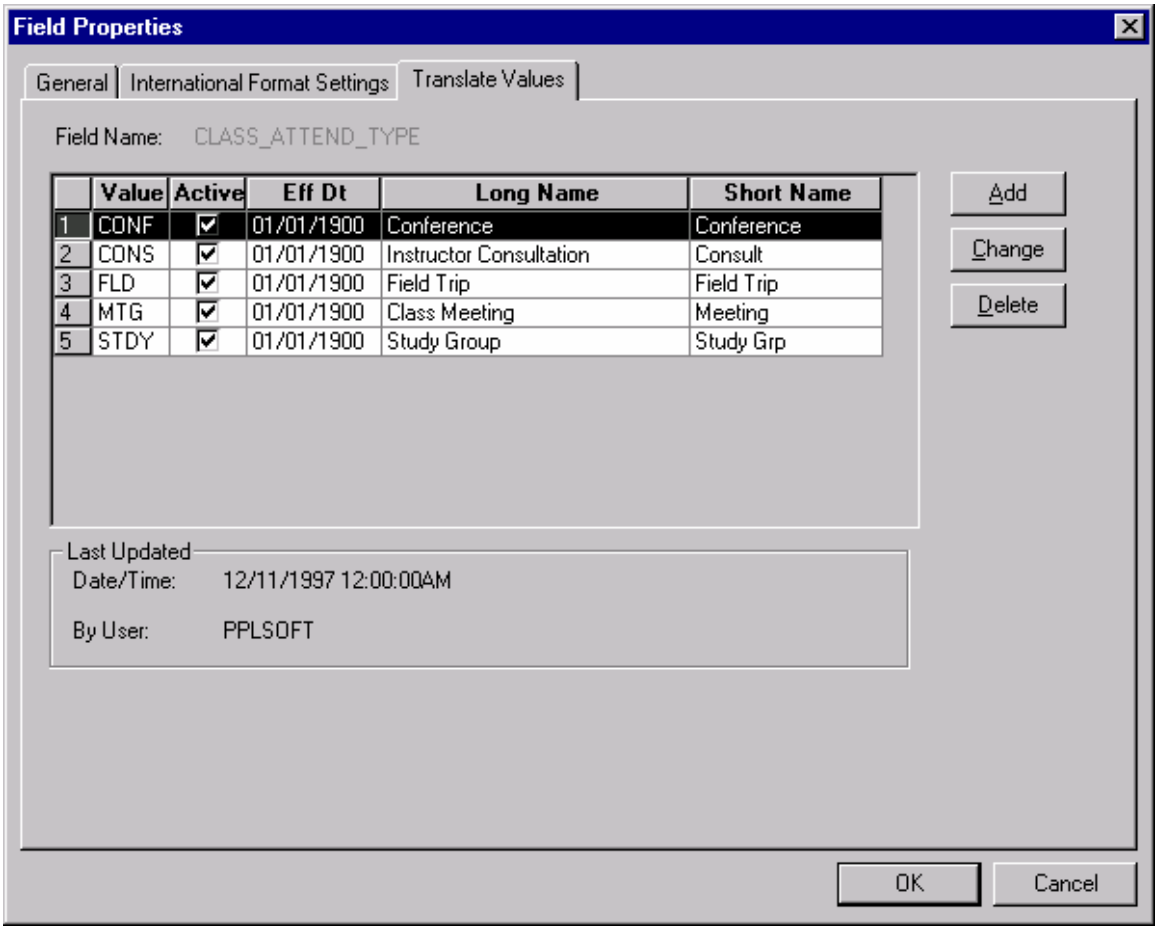
2.5.1 Instruction Mode

Use the instruction mode to capture how a course is delivered.

Recommendations

2.6 Review Attendance Type

Navigation: **Peopletools → Application Designer → Open → field → CLASS_ATTEND_TYP → Review Translates→**



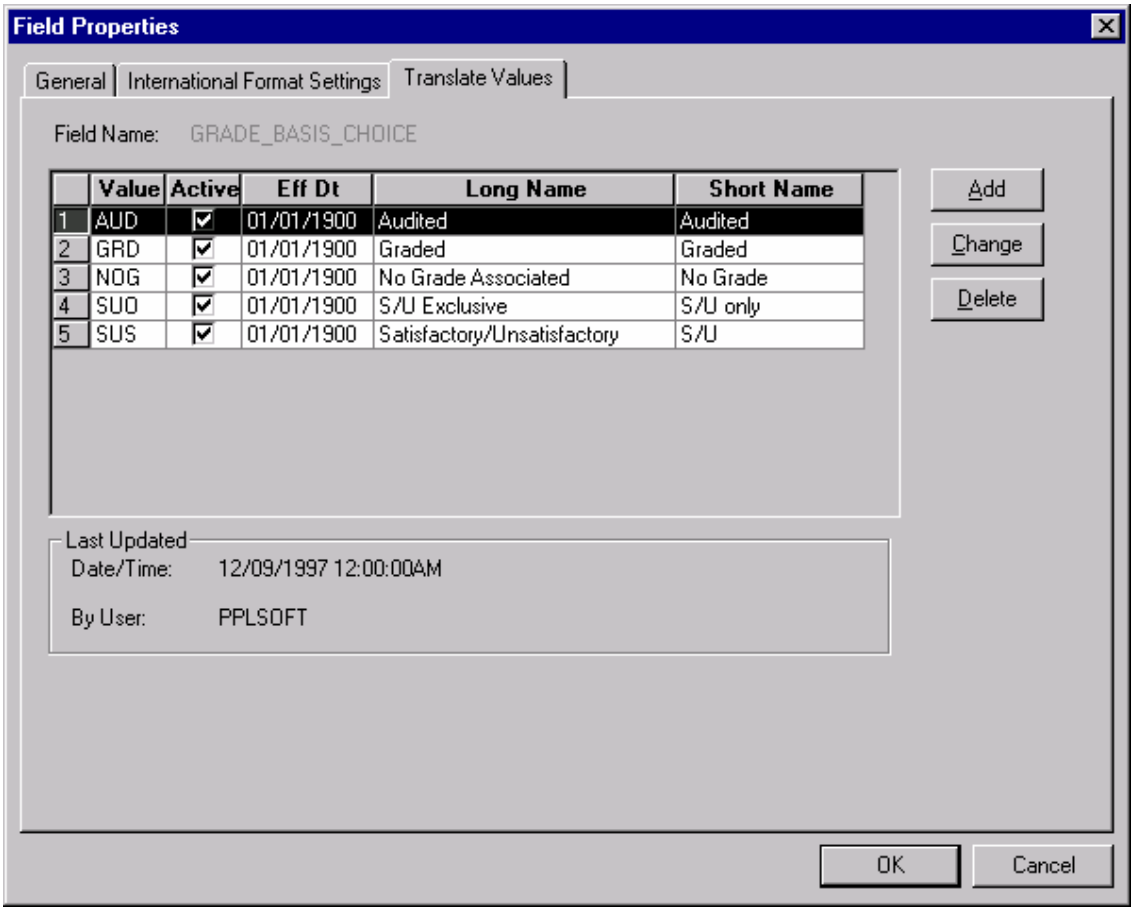
2.6.1 CLASS_ATTEND_TYPE

This table contains **Attendance types** that can be tracked on the attendance roster. Translate values. Each campus will need to decide whether or not they will use the Attendance roster.

Recommendations

2.7 Change Default Grading Basis

Navigation: **Peopletools → Application Designer → Open → Field → GRADING_BASIS_CHOICE → Review Translates→**



2.7.1 GRADE_BASIS_CHOICE

These are the values that can be selected to determine grading basis.

Recommendations

Section 3 Course Catalog Description:

The course catalog page group contains several pages specifying everything you would want to enter for a course offering: the title, units, contact hours, components, description, topics, and so on. You'll take a look at each of the pages in the order in which you'd use them to set up a new course offering. In the design, a course offering includes all components of a course, such as lecture, laboratory, discussion, and so on.

Section 4 Components of Course Catalog:

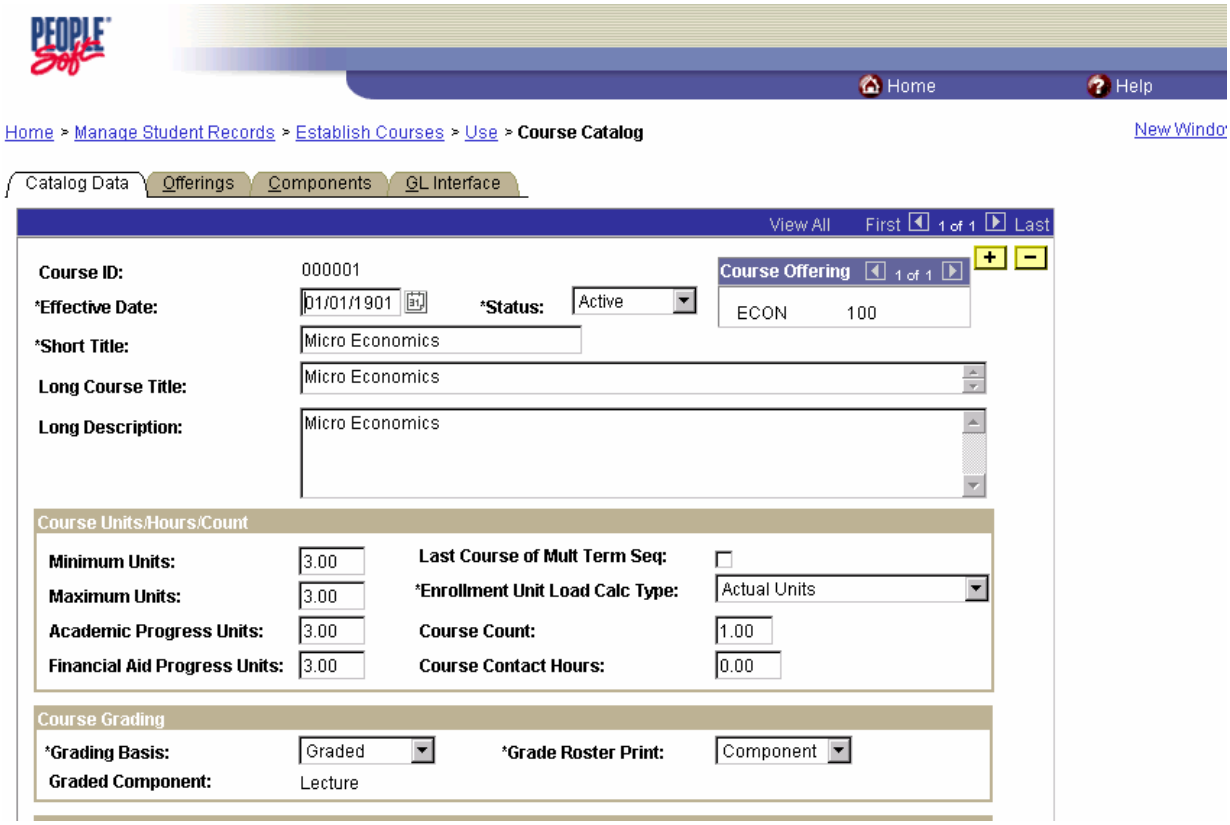
Below is a brief description of the PeopleSoft components used to define the Course Catalog.

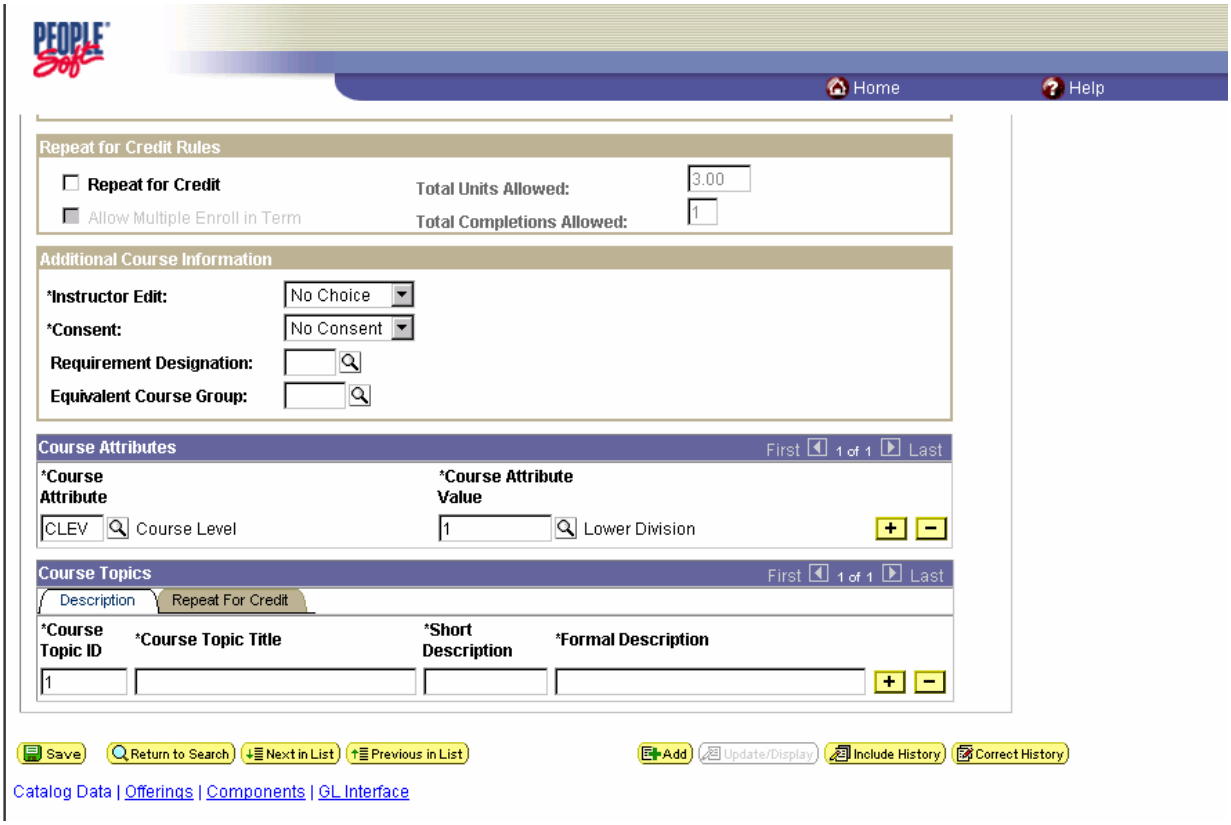
4.1 Catalog Data

Use the Course Catalog Data page to create course titles and determine course units.

Page Name: Catalog Data

Navigation: **Manage Student Records → Establish Courses → Use → Course Catalog → Catalog Data**





4.1.1 Catalog Data

The Course ID is automatically generated by the system. Enter an **Effective Date** for this course. The Effective Date defines when the Status you select is valid. Insert a new effective dated row each time you make a change to a course offering.

When a class is scheduled for a term, the system prompts against the Course Catalog Data page using the start date of the term as the effective date to find the appropriate row. Therefore, a new course catalog doesn't need to be created for every term. Simply revise courses that change, and use the appropriate Effective Date.

Enter the **Description** of the course offering. The description can be displayed in the course catalog report.

4.1.2 Course Units/Hours/Count

The system populates the **Enrollment Unit Load Calc Type** field to **Actual Units** by default. Use this option for any course where you have identical values for the **Minimum Units, Maximum Units,** and **Academic Progress Units** fields.

Use the Academic Units value for any course where the **Minimum Units, Maximum Units,** and **Academic Progress Units** are not identical, such as remedial courses and multi-term sequence courses. Selecting this option requires the system to look at the academic progress units when it calculates academic load.

4.1.3 Course Grading

Select a grading basis for the course. Grading basis values are defined on the Grading Scheme Table page. You can override the grading basis for individual class offerings when you create the schedule of classes. The system displays the graded component based upon the **Grade Roster Print** field value on this page and the Graded Component field value on the Components page. Select the type of grade roster that you want to print for this course offering (as processed through the Grade Roster Print page). Grade roster print values are delivered with your system as translate values. Any modification to these values would require significant programming effort. Your choices for grade roster print are:

By Student: Grade rosters print for each student. Each student has a distinct grade roster, separated by a page break.

Component: Grade rosters print for the graded component of the course. The graded component is specified on the Components page.

Instructor: Grade rosters print for the graded component of the course. The graded component is specified on the Components page. A copy of the grade roster prints for each instructor, primary or otherwise. The number of copies that print is equal to the number of instructors for the course (primary or otherwise).

None: No grade roster prints for the course.

4.1.4 Repeat for Credit Rules

Select the **Repeat for Credit** option to indicate that the class can be repeated for additional credit (as opposed to repeating for grade improvement). If you don't select the option, the class will be subject to repeat rules setup in the Repeat Rule Table page group. If you've selected the Repeat for Credit option, you'll then enter the **Total Units Allowed** for the course when repeated. Next, enter the number of times the course can be repeated in **Total Completions Allowed.**

4.1.5 Additional Course Data

In the **Instructor Edit** field, select how you want the system to prompt for instructor ID's during class scheduling and enrollment. This option determines the prompt values for the instructor ID when your institution schedules classes. It also determines the availability of the Instructor ID field for independent study courses during enrollment, where the student has the option to select the instructor. The system populates the value for the **Instructor Edit** field by default to the Class Associations page, where you can override the value. We deliver Instructor Edit values with your system as translate values. Modification to these values would require significant programming effort. Your choices are:

No Choice: If you select this option, the system makes the Instructor ID field on the Enrollment Request page unavailable and automatically assigns the instructor who is scheduled to teach the class, as indicated on the Schedule of Classes - Meetings page: Assignment tab. Thus, the student has ***no choice*** of instructor.

Class Instructor Edit: If you select this option, the system makes active the Instructor ID field on the Enrollment Request page and prompts you with only the 'Primary Instructors' for the class, as defined on the Meetings page.

Use this option for independent study courses or the like, for which the student can select one of several 'Primary' instructors.

Instructor/Advisor Edit: If you select this option, then for the Instructor ID field on the Meetings page the system prompts you with only the instructors available to teach this course, as defined on the Instructor/Advisor Table page.

Select a **Requirement Designation** for the course. A Requirement Designation can be extra work that has to be done for a course, such as honors, or a Requirement Designation can specify a category of course to use in a course list for Academic Advisement. For example, you can use a Requirement Designation for all courses that fulfill a writing requirement. Requirement Designation values are defined on the Requirement Designation Table page. Examples of requirement designation values are required for Major, Fulfills the Writing Requirement, Honors and so on.

Select an **Equivalent Course Group** for the course. Equivalent course groups are defined on the Course Equivalencies page. Here, you're adding the course to a group of equivalent courses for requisite checking; repeat checking, and degree progress requirement purposes. If two courses have the same Equivalent Course Group number, then they are equivalent to each other. For example, Economics 105 may be the same course as Math 110.

4.1.6 Course Attributes

Select the general characteristics that describe the course offering in the **Course Attribute** and **Course Attribute Value fields**. Course Attributes and Course Attribute Values are defined on the Course Attribute Table page. Course Attributes do not feed into Academic Advisement. They are primarily used for institutional reporting purposes, and to print repetitive text in the catalog and schedule of classes.

4.1.7 Course Topics

Use the Course Catalog **Topics** entry to define course topics associated with a course. Determine if you will allow students to repeat the topic for credit. If so, check the "Repeat for Credit" box and specify the total units and completions allowed.

Recommendations

Enter an effective date that precedes any historical class offering.

There are multiple values that will be required by the APDB that will be captured in the Course Attribute field. The following APDB fields will be captured in the Course Attribute field:

1. **Course Level (Course Catalog Level)**
2. **Course Suffix (Class Schedule Level)**
3. **Course type (Class Schedule Level)**
4. **Service Learning Indicator (Class Schedule Level)**

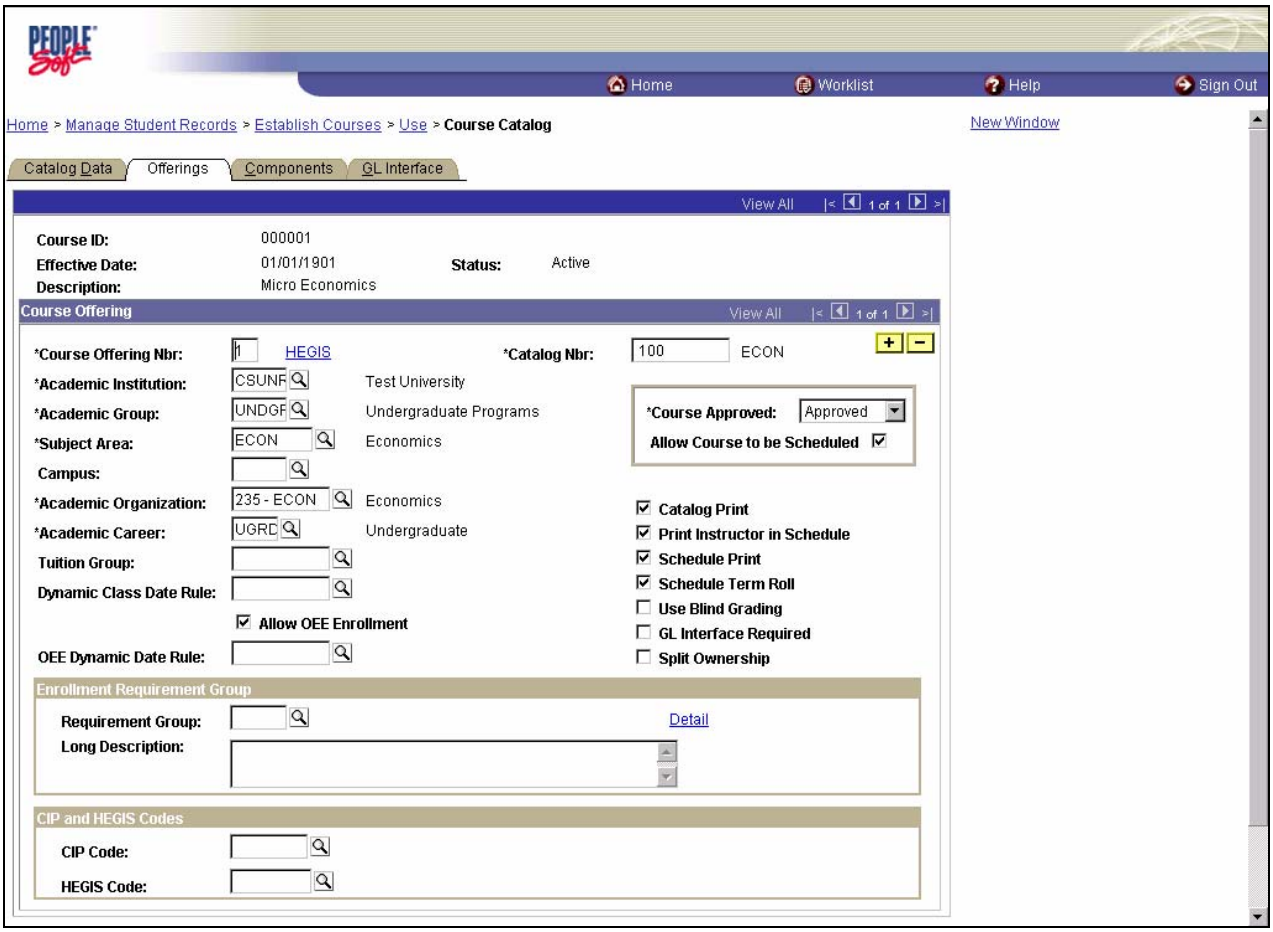
It will need to be determined during the setup of the course/class attributes, which values will print in the course catalog or schedule of classes.

4.2 Offerings

Use the Course Catalog Offerings page to define course numbers, link academic organizations to course offerings, and so on.

Page Name: Offerings

Navigation: **Manage Student Records → Establish Courses → Use → Course Catalog → Offerings**



4.2.1 Course Offering

The system generates the **Course Offering Number**. It is used for sequencing. The Course Offering Number is also used to distinguish those cross-offered courses, where the course ID is the same, as are the requisites, but the course itself is listed in different subject areas, academic groups, and so on.

Enter the **Catalog Number** for the course. Catalog number ranges are linked to Academic Careers on the Academic Group Table page. The system automatically reformats the Catalog Number you enter to fit the defined system format. The first four numbers are positioned in spaces one through four, and the remaining characters are moved (in order) to the last six spaces. Any extra alpha characters are truncated. The Course Catalog Number will be used to capture the **Course Number** for the APDB report. This element is used in conjunction with the course abbreviation and Course Suffix to identify a course.

Select the **Subject Area** of the course offering. Subject Area values are defined on the Academic Subject Table page.

Select the **Course Approved** status. *Course Approved values are delivered with your system as translate values. Modification to these values would require programming effort.* Select Pending or Denied to prevent anyone from scheduling the class—the system will not list the course in the class scheduling function. Select Approved to enable scheduling of the course offering. You must also check the box "Allow Course to be Scheduled".

Only one requisite can be attached to a particular course offering. However that requisite can include multiple conditions. For example, the requisite for Biology 100 could be the following:

English 100 and the student's **Academic plan** must equal **Biology**. If the requisite is more complex and unique to an individual course, then a distinct enrollment requirement will need to be setup for each course offering. Most of your course requisites can be met by using Enrollment Requirement Groups.

A new table/field will be added to this page to capture the **CO HEGIS classification** (COSAR Table 06) for the APDB report. The **Discipline Code** in the APDB report is captured by this Element. The CO HEGIS table will be SOSS owned.

OEE Enrollment check box, the system assigns the value of this check box by default based on the Allow OEE Enrollment check box on the Academic Career Table page for the academic career with which you have associated this course offering. You can override this default on an offering-by-offering basis. Select this check box to attach a dynamic date rule to the offering, thus enabling students to enroll in OEE class sections of this course offering. The **OEE Dynamic Date Rule** field becomes available for edit. If you do not select the check box, you can always define the rule on the Dynamic Class Dates page.

4.2.2 Enrollment Requirement Group

Use the **Enrollment Requirement Group** group box to link requisites to courses. Enrollment requirement groups can consist of a variety of elements: courses, units, GPA, and so on. Select the enrollment requirement group. Enrollment requirement group values are defined on the Course Requisite page.

4.2.3 CIP and HEGIS Codes

Use the **CIP and HEGIS Codes** group box to link CIP and HEGIS codes to course offerings

Recommendations

Academic Group valid values must have a one to one correlation for your campus to COSAR table 8 (**School Code**) for APDB Chancellor's Office reporting.

The **Academic Organization** field will be loaded per the Academic Structure setup to map to the COSAR Table 9 (**Department Code**). These values will be used for the APDB report to capture the **Department Code**. You must set up Academic Organizations for Schools and Departments using values from COSAR 008 and COSAR 009 tables respectively.

The **Subject** field will be used to report the **Course Abbreviation** field for the APDB report. The reported value must be 5 characters and left justified. Embedded and/or trailing blanks are allowed.

The **Course Catalog Number** will be used to capture the **Course Number and Course Suffix** for the APDB report.

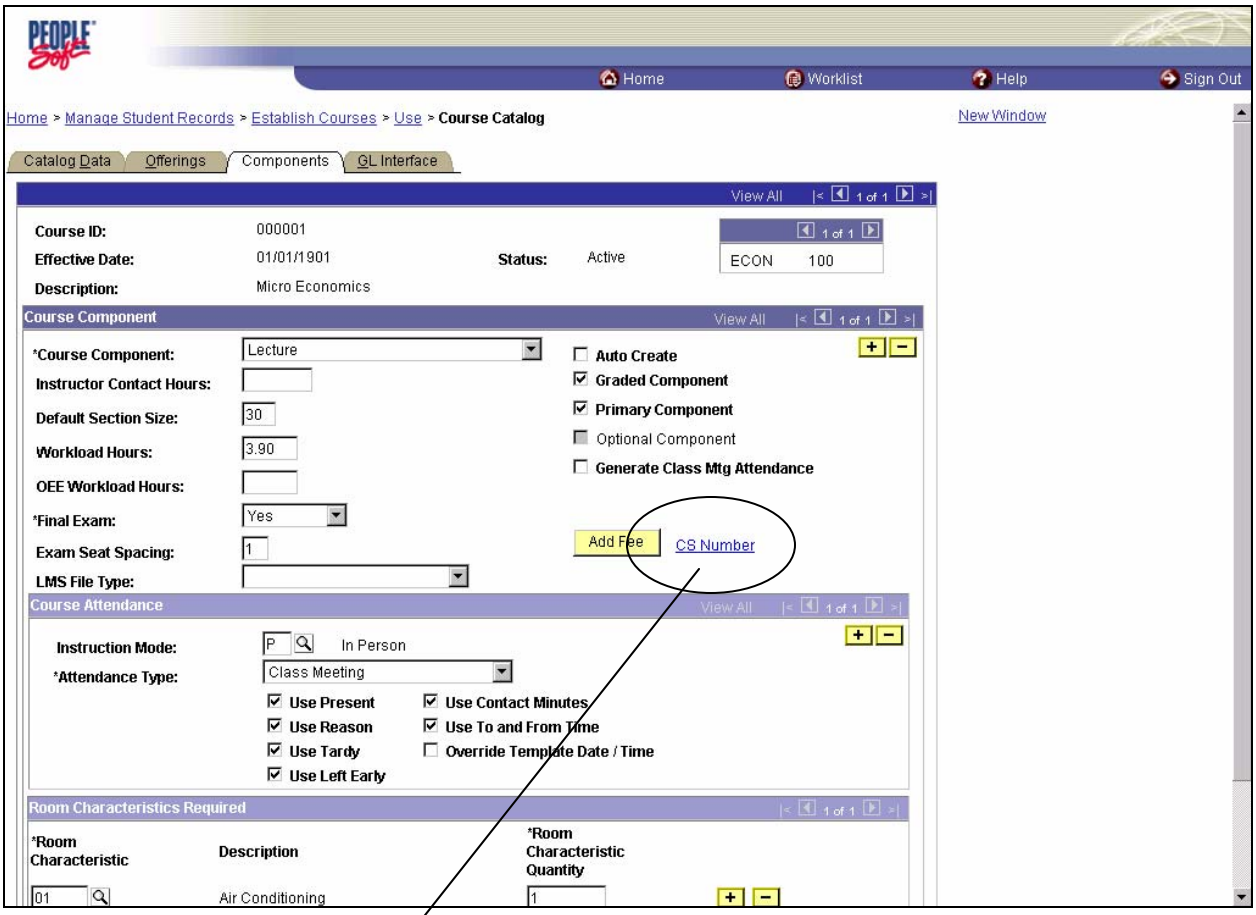
The **CO Hegis Classification** (COSAR table 06) will be captured for each offering of a course. This element is reported as the **Discipline code** for the Section APDB report.

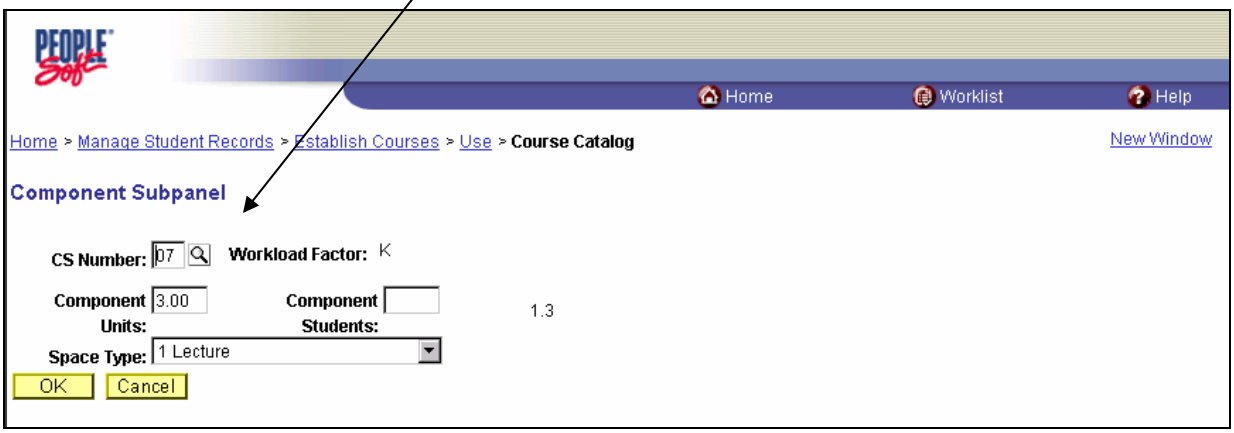
4.3 Components

Use the Course Catalog Components page to define components like lecture, lab, and discussion as well as instructor contact hours, room characteristics, additional fees, and final exams.

Page Name: Components

Navigation: Manage Student Records → Establish Courses → Use → Course Catalog → Components





4.3.1 Course Component

Select a Course Component. Course Component values are delivered with your system as translate values. You can modify these values. The Course Component indicates the parts of the course offering (lecture, laboratory, seminar) and so on. One course offering can have multiple components. The **Course Classification (C/S) number** will be captured on a sub-page off of the Course Component page. This number will be used for APDB reporting. The CS "K or S" Factor multiplied by the Component Units (K) or Component Students (S) will determine the workload hours for a particular course component. The Units/Students for a component need to be added manually. Workload hours will be established for each component by an automatic calculation when the page is saved. The Workload hours will default to the Class Schedule when an instructor is added to a class section. The **Space Type** field on the APDB report will be captured on the sub-page as well. Only one C/S number will be captured per course component. These values will be inherited at the Class Section Level of the Schedule of Classes when the Component for the course is scheduled as a Class Section.

Select the **Auto Create** check box for each component to have the system automatically create that component of the course in the schedule of classes. If you have defined the course as having a required component, such as a lab or discussion, and you select to have the system automatically create this component, then when you are scheduling a new class section on the Class Schedule Entry page click the Create button. The system automatically populates the schedule of classes pages with the required component data for that class section. This saves you data entry and ensures that one section for each required component has been scheduled.

Select the **Graded Component** option to enable grading of this component. *Only one component can be graded. The value you choose is displayed on the Course Catalog Data page.*

4.3.2 Course Attendance

If you plan to use attendance tracking, you will generate attendance rosters through the Attendance Roster Generator entry.

The instruction mode indicates whether the course component is taught ***In Person*** or using ***Interactive TV, World Wide Web, Correspondence,*** and so on. The instruction mode relates to the attendance type. You can indicate an instruction mode, then select attendance type values for the course component that relate only to this instruction mode. For example, by selecting the ***In Person*** instructor mode, you can select an attendance type that applies only to the ***In Person*** instruction mode. If you leave the **Instruction Mode** field blank, the attendance types that you define for the course component applies to all instruction modes. When you create and update attendance rosters, only the attendance type values that relate to the instruction mode for the class are available for you to use. Instruction modes for classes are set on the Schedule of Classes - Basic Data page. Instruction mode values are delivered with your system as translate values. You can modify these values.

4.3.3 Room Characteristics

Select the room characteristics that you require for the course component. Room characteristic values are defined on the Room Characteristic Table page. Characteristics you enter here default to the schedule of classes. Insert rows to add additional characteristics. The **Room Characteristic** field is used for interfacing to the Universal Algorithm's product, Schedule25. The maximum number of room characteristics for Schedule25 is 96. Therefore, be sure you select values between 01 and 96 if you use Schedule 25.

Recommendations

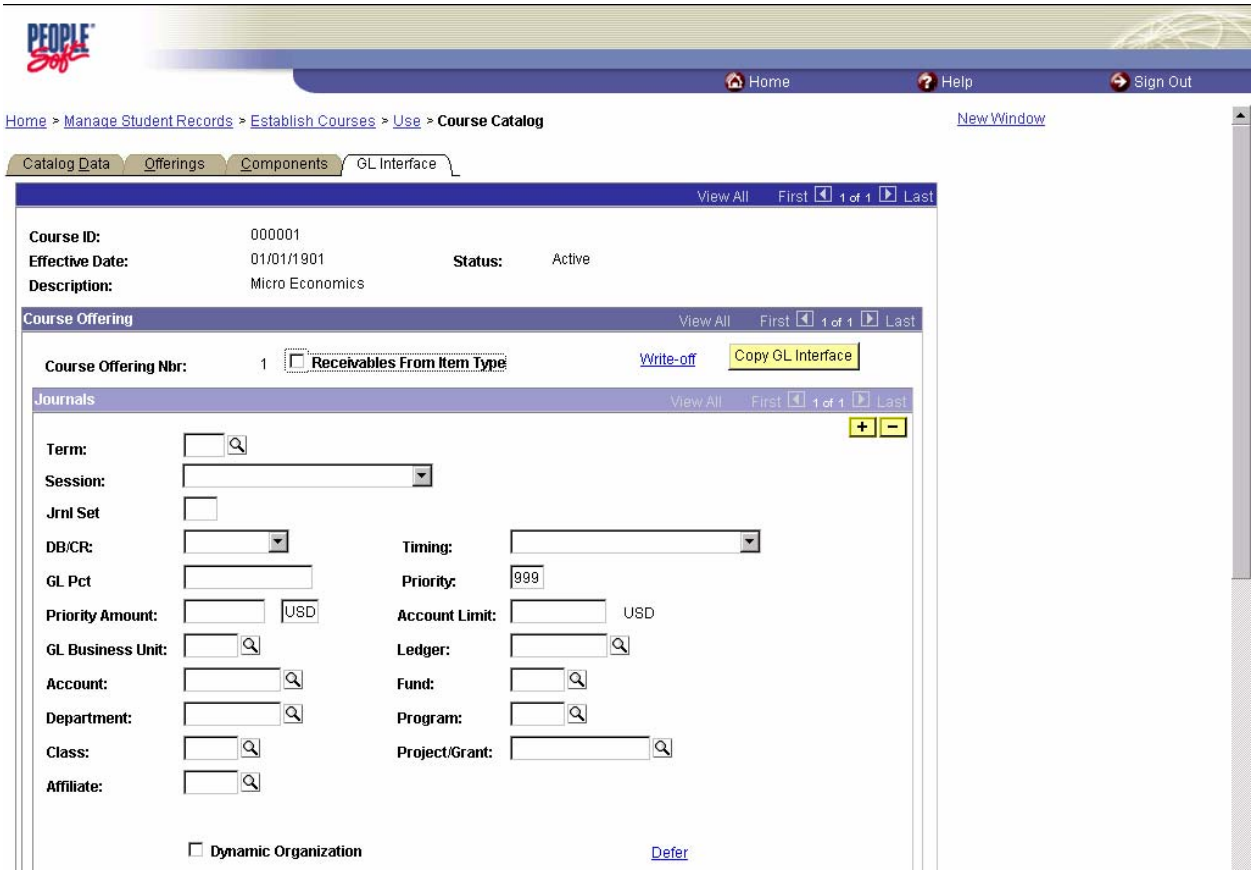
Discuss the add fee option with Student Financials prior to completion of setup. If your institution is going to use Attendance, then check the box for "Generate Class Mtg Attendance".

4.4 GL Interface

Use the Course GL Interface page to map course fees as item types to their proper General Ledger Accounts. The system generates charges to the student's account based on the course code you define in this page group and offsets these charges based on the General Ledger you define in this page. Your office needs to coordinate the information in this page with your controller's office.

Page Name: GL Interface

Navigation: **Manage Student Records → Establish Courses → Use → Course Catalog → GL Interface**



4.4.1 Journals

This is an optional function.

Recommendations

Check with FS and Student Financials to determine if the GL Interface will be used.

Section 5 Enrollment Requirement Groups

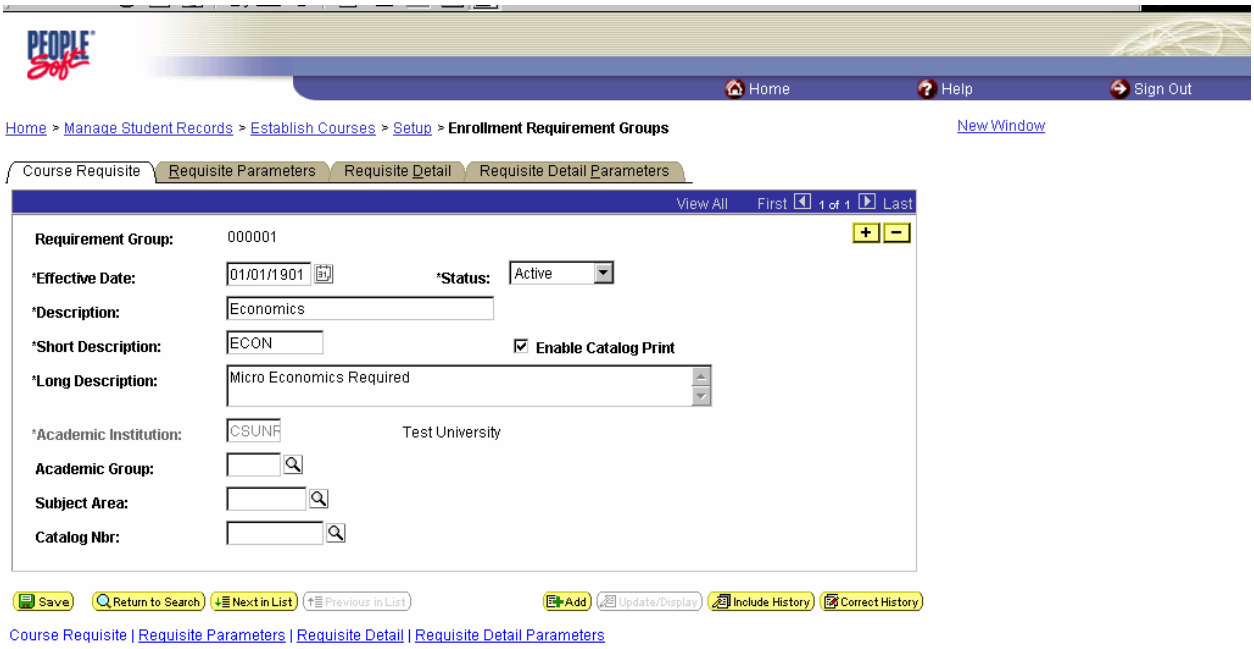
Enrollment requirement groups encompass requisites based on a variety of factors including **GPA** and **units**, **courses**, as well as **conditions** such as Academic Level and Plans and many more. Virtually every requirement your institution has for courses can be satisfied with the Enrollment Requisite Group feature. Enrollment requirement groups are also used for **reserve capacity** portions of classes. You can create enrollment requirement groups that are later attached to classes designating a reserve capacity for a certain level (freshman, sophomore, and so on), GPA, units, or other attributes.

5.1 Course Requisite/Restrict

Use the Course Requisite/Restrict page to describe the Enrollment Requirement Group. The system generates a unique numeric identifier for the Group, although you can enter your own number for the group.

Page Name: Course Requisite

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Requirement Groups → Course Requisite



5.1.1 Course Requisite

You'll attach enrollment requirement groups to courses in the course catalog, and you can override these requisite rules or append to them on a class-by-class basis when you create the schedule of classes. One course catalog offering can specify one enrollment requirement group rule, but that rule can contain multiple course requisites (both prerequisites and co-requisites) and non-course enrollment restrictions. Multiple course offerings can use the same enrollment requirement group.

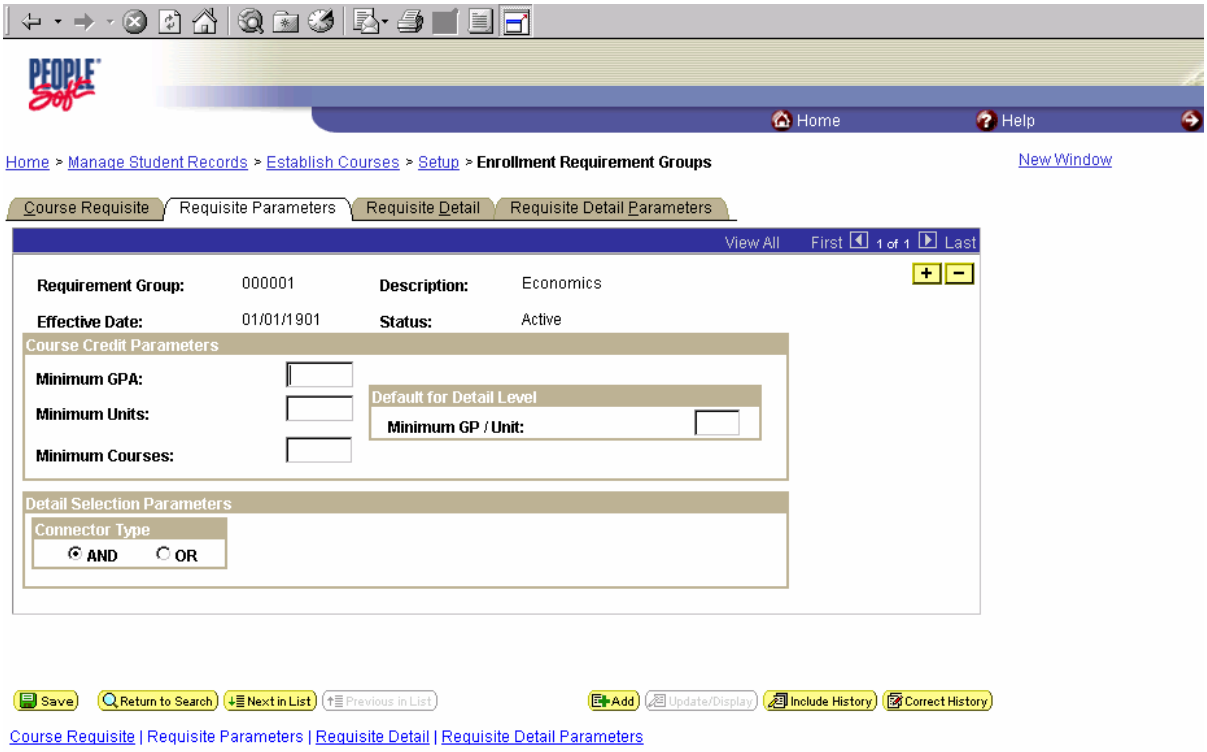
Recommendations

5.2 Requisite Parameters

Use the Requisite/Restrict Parameters page to link minimum GPA and unit requirements to the Group. The GPA and unit minimums entered direct the overall course restrictions for the classes specified in the subsequent requirement pages. Entering values on this page is optional.

Page Name: Requisite Parameters

Navigation: **Manage Student Records → Establish Courses → Setup → Enrollment Requirement Groups → Requisite Parameters**



5.2.1 Course Credit Parameters

Course Credit Parameters are overall filters that the system uses in the evaluation of requisites. These fields are optional. For enrollment requirement groups with more than one Requisite Detail line, select the appropriate connector type. The Connector Type indicates if the student must meet *all* of the requirement line detail conditions (***AND***) or if the student only needs to meet one of the requirement line details (***OR***). This value is used as the connector default on the Requisite Detail page when rows are inserted.

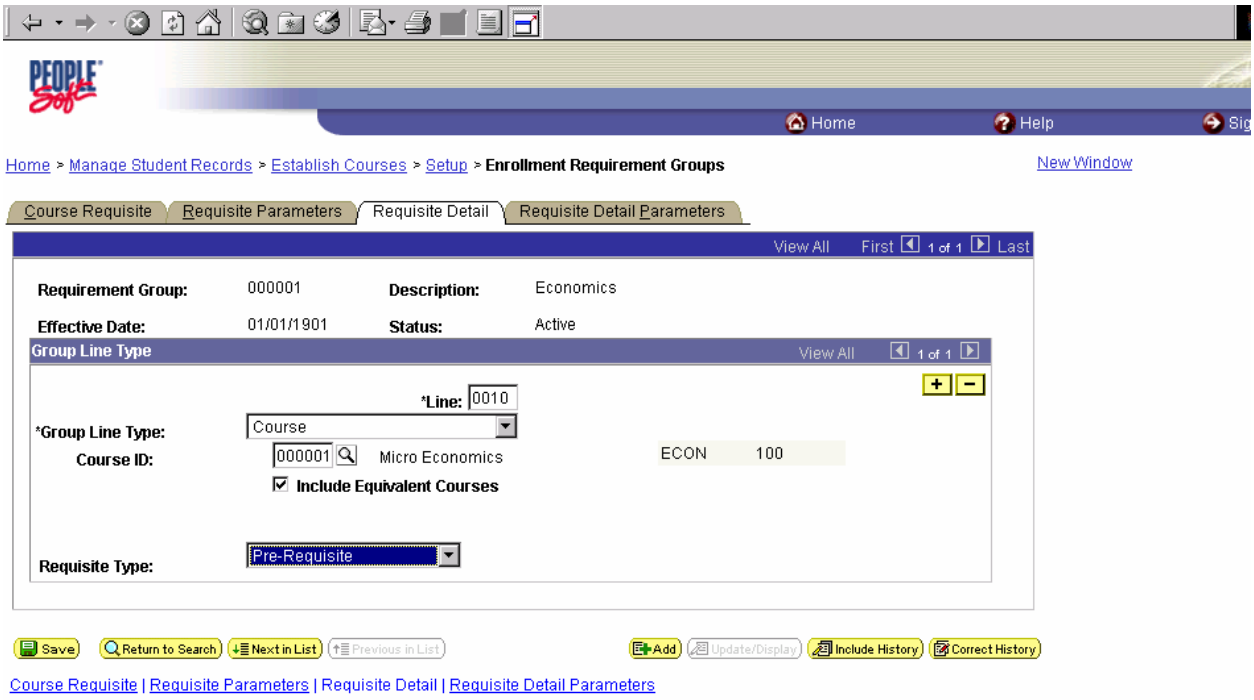
Recommendations

5.3 Requisite Detail

Use the Requisite/Restriction Detail Page to link the actual courses or non-course requirements to the Enrollment Requisite Group.

Page Name: Requisite Detail

Navigation: **Manage Student Records → Establish Courses → Setup → Enrollment Requirement Groups → Requisite Detail**



5.3.1 Group Line Type

The Group line types that are available for selection are listed below:

1. **Condition**: Specifies allowable values of data elements associated with a student. For example a condition of Program equal to Undergraduate Liberal Arts.

2. **Course:** Specific course(s) a student must take to fulfill the requisite.

3. **Requirement**: Specifies individual required elements. You are prompted for the Enrollment Requirement number. Enrollment Requirements are used fulfill your most complicated requirement rules and are created in the Enrollment Requirement page group.

4. **Wild Card Course**: Specifies a range of courses based upon Subject Area and Catalog Number. For example, Wild Card Courses of English 1** and above, where the range starts at any English course beginning with 1.

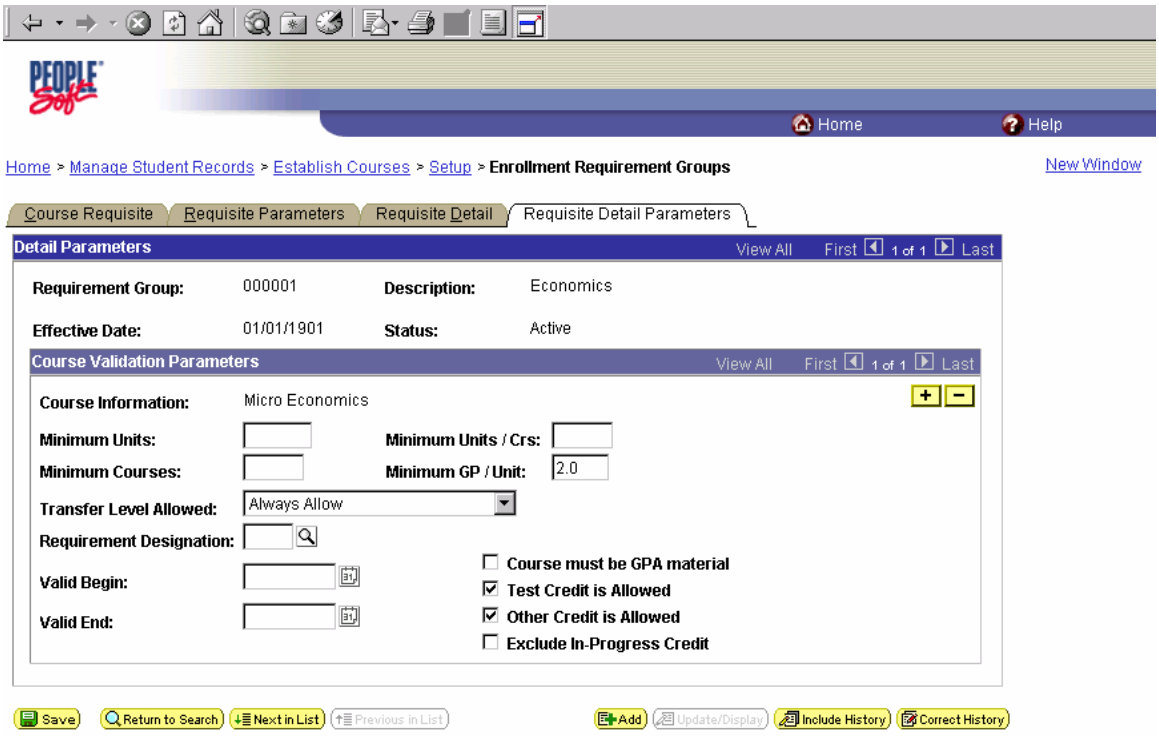
Recommendations

5.4 Requisite Detail Parameters

Use the Requisite/Restriction Detail Parameters page to define the details of the course requisite minimum units and GPA.

Page Name: Requisite Detail Parameters

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Requirement Groups → Requisite Detail Parameters



5.4.1 Course Validation Parameters

You will define any additional parameters for the requisites that you establish. For example: You may require that a student successfully complete English 100 before they can take any History courses. You can also establish that the student must complete that course with a 2.0 or above.

Recommendations

Section 6 Enrollment Requirements

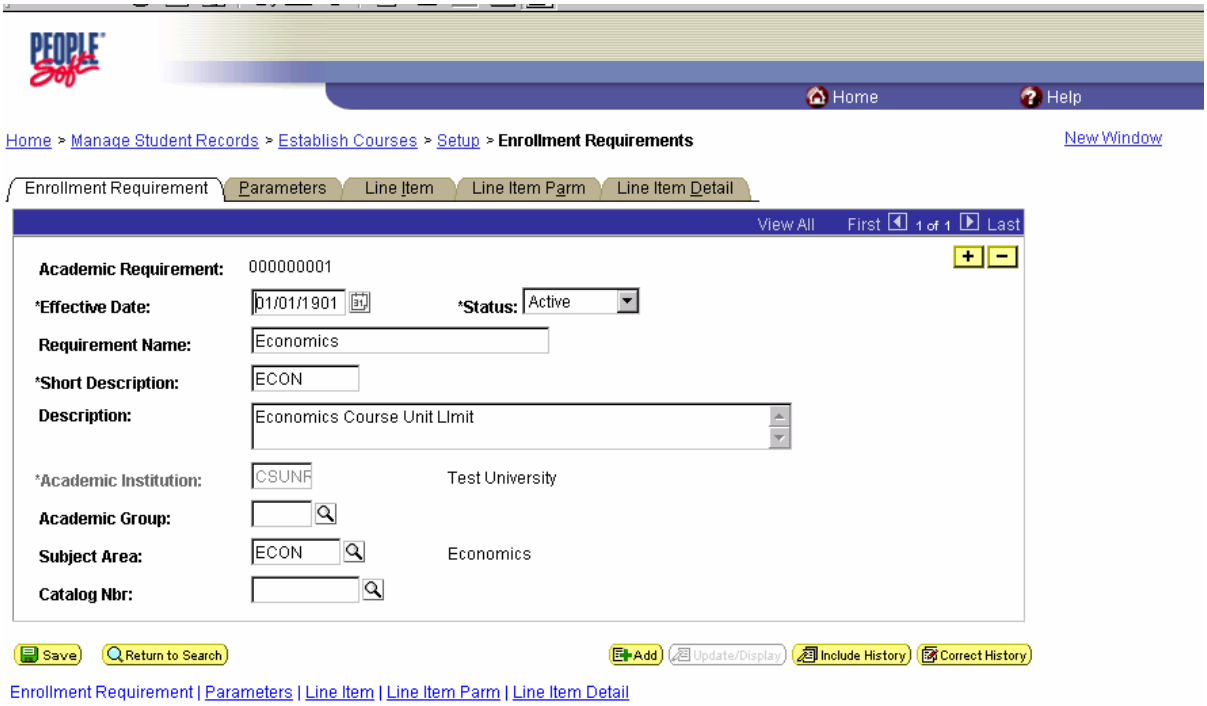
Enrollment requirements are for more complicated requisite needs. You'll create enrollment requirements only if you are using the Requirement Group Line Type in an enrollment requirement group. If you create an enrollment requirement, you also can choose to create a course lists.

Create enrollment requirements for global limits, sequential restrictions, and unit/course restrictions.

6.1 Enrollment Requirements

Page Name: Enrollment Requirement

Navigation: **Manage Student Records → Establish Courses → Setup → Enrollment Requirements → Enrollment Requirement**



6.1.1 Enrollment Requirement

In order to fully understand enrollment requirements, we recommend that you read the Academic Advisement section Establishing Academic Requirements in Academic Advisement Business Processes. The pages are virtually the same in Academic Advisement and in Student Records.

Recommendations

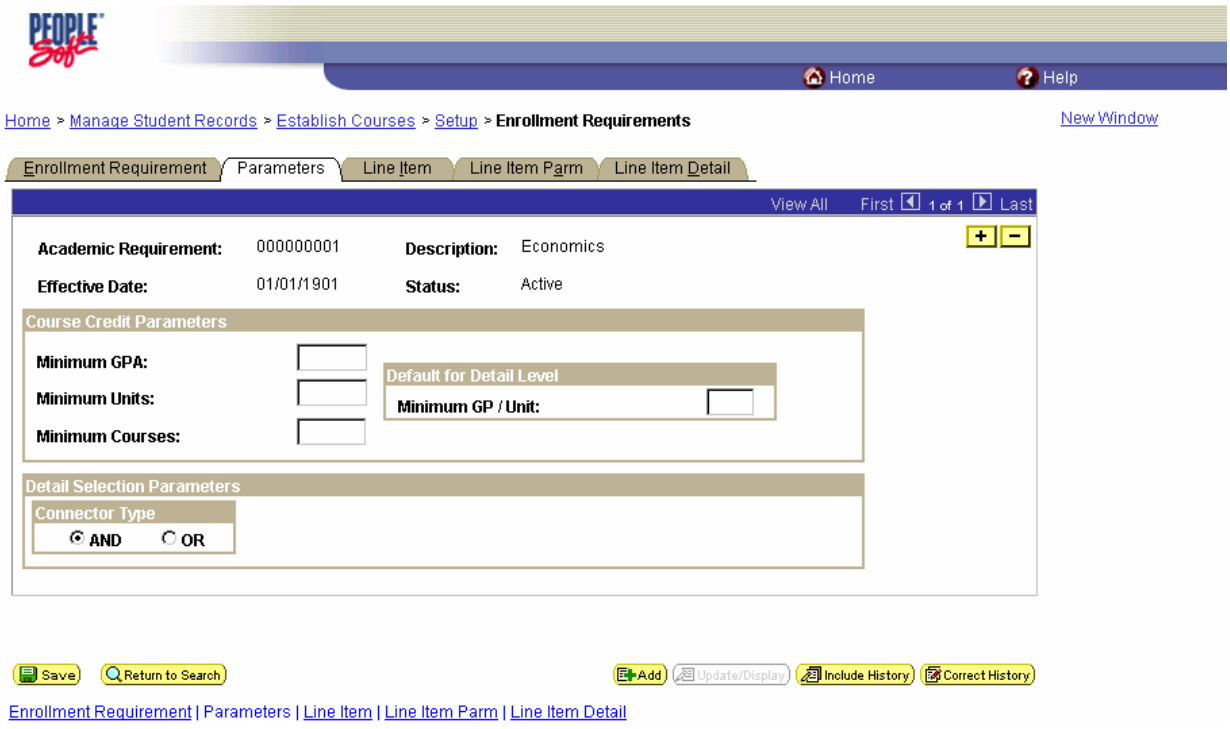
Complicated Enrollment Requisites need to be examined and detailed in these pages. For example: ZOOL 174: Not open to students with credit in ZOOL 137 or ZOOL 172. Prerequisite: BIOSC 130. Develop these pages in conjunction with development of Academic Advising.

6.2 Requirement Parameters

Use the Requirement Parameters page to enter overall GPA and unit limits for the Requirement. This page is virtually the same as the Course Requisite/Restrict page.

Page Name: Parameters

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Requirements → Parameters



6.2.1 Course Credit Parameters

Course Credit Parameters are overall filters the system uses to evaluate requirements. These fields are optional.

Enter the overall Minimum GPA for classes selected to meet this requirement.

Enter the total Minimum Units for the classes selected to meet this requirement.

Enter the total Minimum Courses for the requirement.

The system uses the Minimum GP/Unit you enter as a filter in the requisite/restriction checking process. This technique is used to simplify and generalize the comparison logic. The Minimum Grade Points Per Unit is the minimum grade points allowed for any individual class enrollment selected to meet the requirement.

Select the appropriate Connector Type. The Connector Type indicates if the student must meet ALL of the requirement detail conditions (AND) or if the student only needs to meet one condition (OR). This page control is used as the connector default on the Requirement Line Item page when rows are inserted.

These fields are optional.

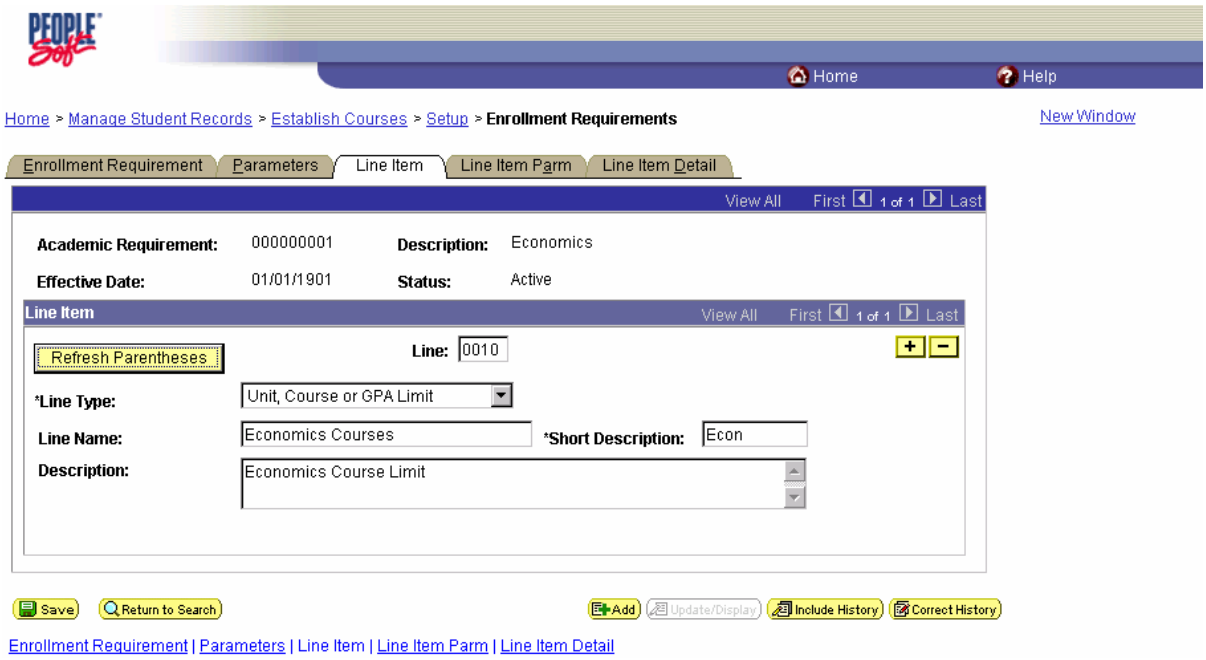
Recommendations

6.3 Line Item

Use the Requirement Line Item page to define the requirement line type.

Page Name: Line item

Navigation: **Manage Student Records → Establish Courses → Setup → Enrollment Requirements → Line Item**



6.3.1 Line Item

The system generates a sequential Line number. The number determines the order in which the detail lines should be evaluated. You can override the number.

Select a Line Type to specify the types of requirement checking that will occur against a student's records at enrollment time. Line Type values are delivered with your system as translate values. Modification to these values is not recommended.

There are various line types to be selected from, the values are as follows:

1. **Condition Requirement** line type specifies conditions associated with the student. (Complement of Line Conditions option appears on page for this line type. If selected and conditions stated on Requirement Line Item Detail page are true, false is recorded. If selected and any conditions stated on Requirement Line Item Detail page are false, true is recorded. If not selected and conditions stated on Requirement Line Item Detail page are true, true is recorded. If not selected and any conditions stated on Requirement Line Item Detail page are false, false is recorded.)
2. **Course Requirement** line type enables you to specify a course list (static or derived) from which the student must take individual courses. The number of course units and courses can be indicated on the Requirement Line Item Parameters page.

3. **Global Limit** line type applies to a student's entire audit and splits courses even when the Enable Splitting option on the Requirement Line Item Controls page is not selected. The limits usually affect courses taken from a specified list, units, or GPA in course requirement lines and specific course lines. These courses are usually affected because the global limit is activated only when encountered. For example, this line type can be used to ensure that a student uses no more than 9 units of remedial work towards the 120 units required to graduate. The Global Limit line type is usually attached to a requirement group, which is designated at the career level with a reporting sequence of 1.
4. **Global Sequential Requirement** line type checks all courses on the student's record to verify that the student took the courses in the proper sequential order (as specified in the course list). If courses are out of order, the courses are excluded from the entire audit at the level (for example, career, program, or plan) that it is processed. For example, to enforce a particular sequence of courses for the entire audit, place restriction at the career level.
5. **Sequential Restriction** line type checks courses used by the stated requirement or other target to verify that the student took the required courses in the correct order. (Local targets are defined on the Requirement Line Item Detail page. In the absence of a local target, default target is the current requirement.) If it is not correct, the courses are disallowed in the course requirement lines and specific course lines, but are available to be used by other requirements.
6. **Specified courses** line type enables you to specify a course list from which the student must take one of each type of course represented in the list. The number of course units and courses can be indicated on the Requirement Line Item Parameters page. (Default is one if no other parameters are specified.) As noted, the student is required to take at least one of each specified course type in the list. For example, if the course list consists of a wild card for Math plus a wild card for Physics and Chemistry 100, the student must satisfy one of each type of course.
7. **Unit, Course, or GPA** limit line type checks courses used by a stated requirement or other local target to verify maximum units, courses, or GPA limits. (Local targets are defined on Requirement Line Item Detail page. In the absence of a local target, default target is the current requirement.) If the unit, course, or GPA limit is exceeded, the courses are disallowed in the course requirement lines and specific course lines, but are available to be used by other requirements.

Recommendations

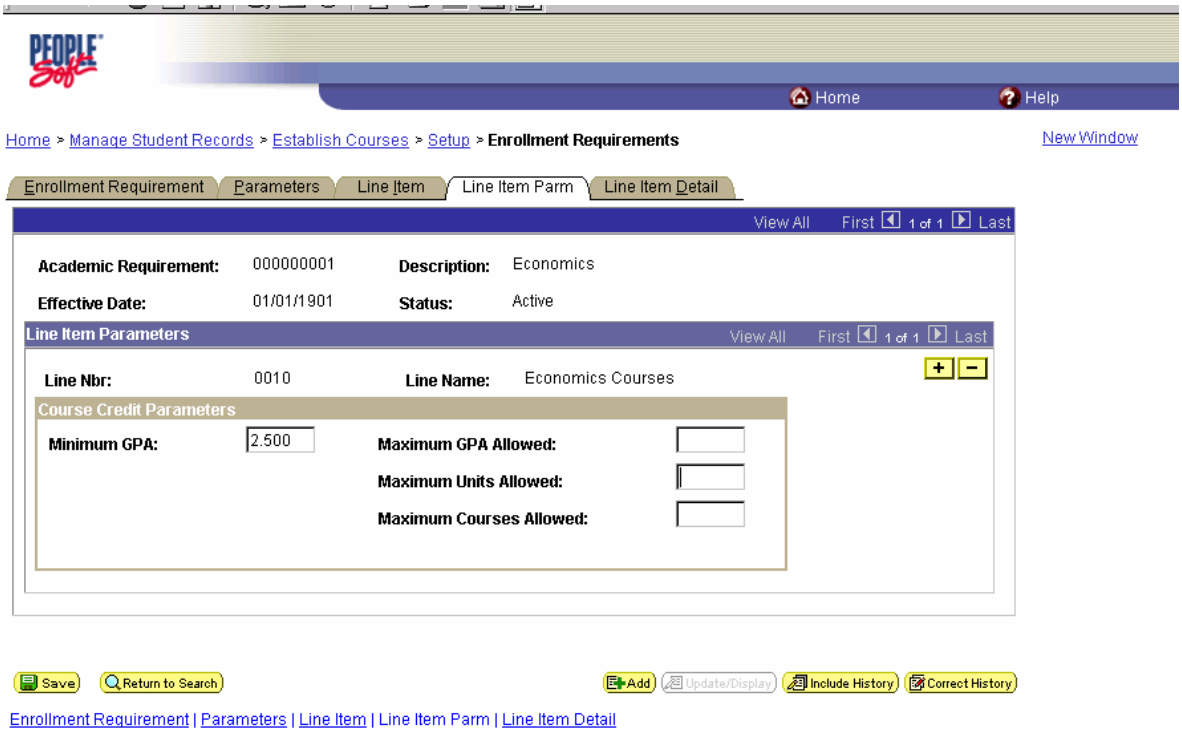
The most complicated requisites can be accomplished using the Enrollment Requirements page group.

6.4 Line Item Parameters

This page contains line item parameters for the specified academic requirement. The fields that are available depend on the Line Type that is recorded on the Requirement Line Item page.

Page Name: Line Item Parm

Navigation: **Manage Student Records → Establish Courses → Setup → Enrollment Requirements → Line Item Parm**



6.4.1 Course Credit Parameters

The values recorded here take precedent over the parameters recorded at the requirement level and at the requirement group level. For example, the line item parameters might require 6 units, but the requirement parameters only need 3 units. The audit engine searches for 6 units.

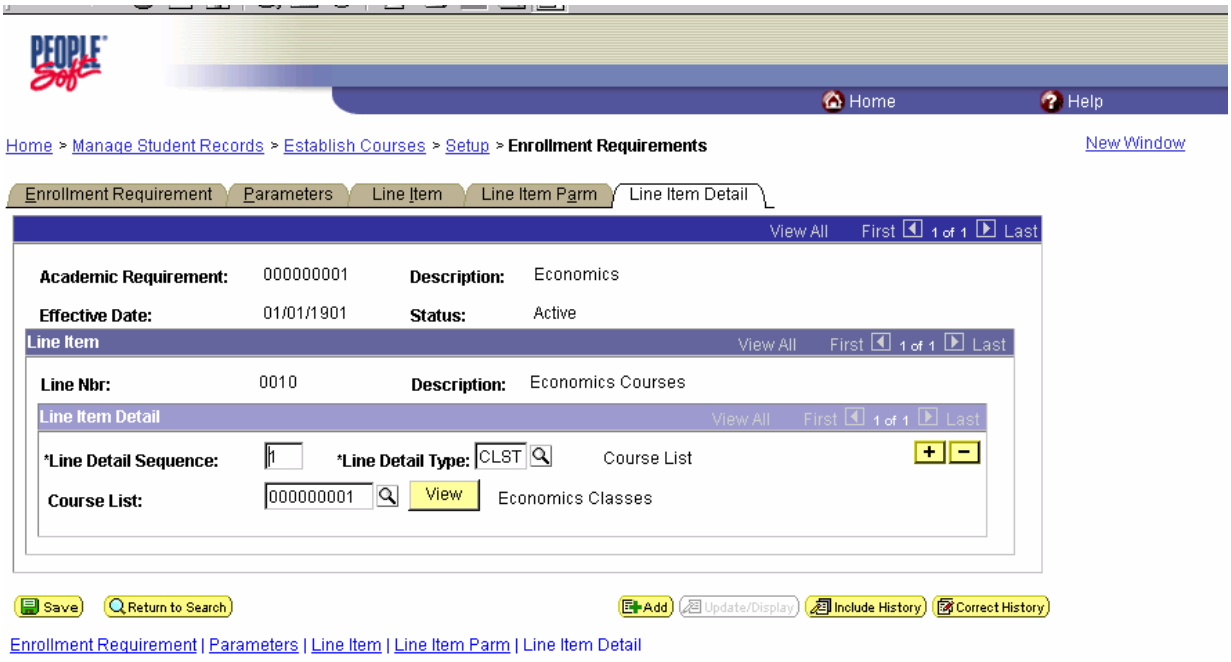
Recommendations

6.5 Line item Detail

Use the Requirement Line Item Detail page to link course lists and derived course lists to your Line Items.

Page Name: Line Item Detail

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Requirements → Line Item Detail



6.5.1 Line Item Detail

Review the setup for Academic Advising.

Recommendations

Section 7 Enrollment Course Lists

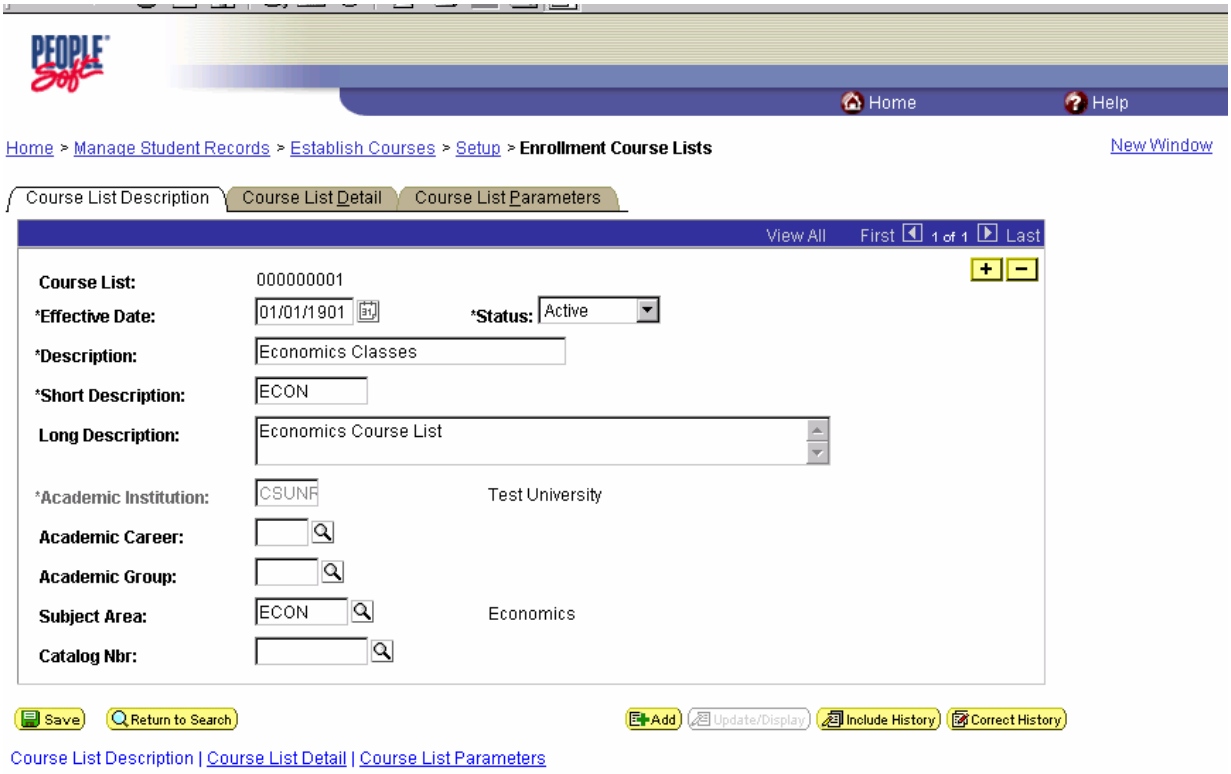
Create course lists only when you are creating enrollment requirements, which possess a course list requirement. Course Lists must be set up before enrollment requirements can be established. Course Lists are attached to Enrollment Requirements and then that combination is attached to the Enrollment Requirement Groups.

7.1 Course List Description

Use the Course List Description page to describe the course list.

Page Name: Course List Description

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Course Lists → Course List Description



7.1.1 Course List Description

There are course lists and derived courses lists. Course lists are static pre-defined lists of courses, which you attach to enrollment requirements. Derived course lists are a set of courses, which you attach to enrollment requirements and can specify how many courses from the list will satisfy specific requirements.

Recommendations

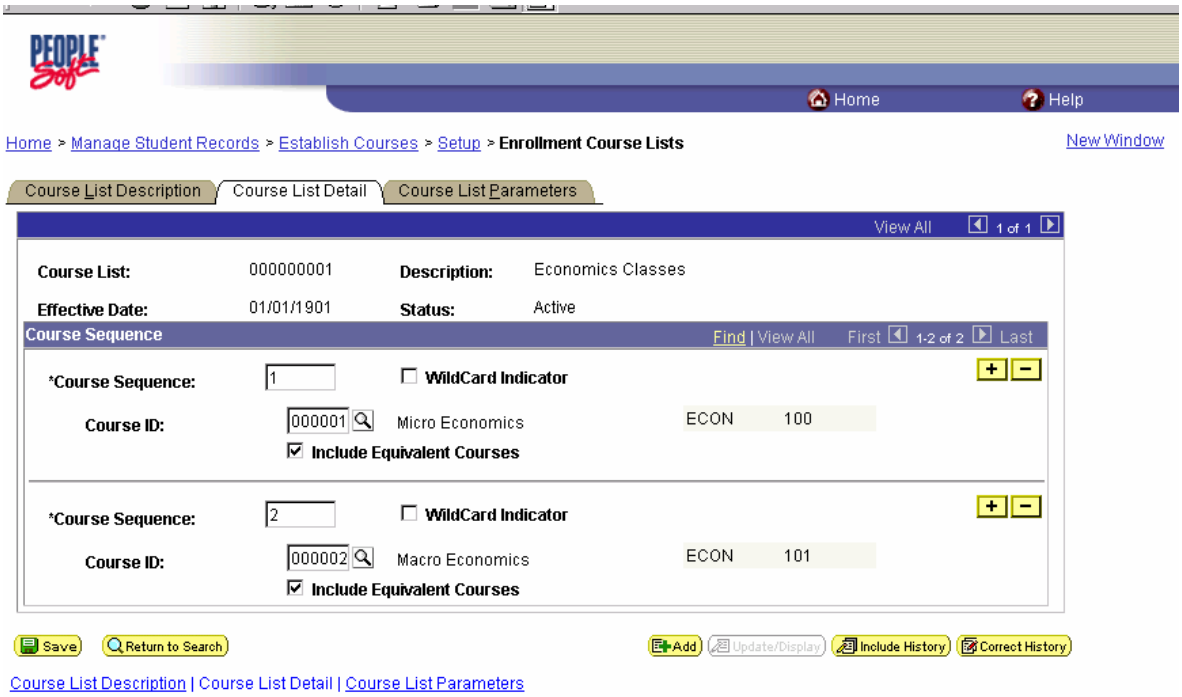
Review the setup for Academic Advising.

7.2 Course List Detail

Use the Course Detail page to link the actual courses to the Course List. A course is specified either by a unique Course ID or by using the Wildcard indicator.

Page Name: Course List Detail

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Course Lists → Course Detail



7.2.1 Course Sequence

Use the Course Detail page to establish exactly which course(s) comprise the course list. A course is specified either by a unique course ID or by using the wildcard indicator. For example, you can insert a row with the course ENGL 62 or set up a list of all ENGL courses rather than manually enter each course row by row. To set up a list of all courses, simply select the Wildcard Indicator option and enter a course of ENGL ### in the Catalog Nbr field. This value automatically includes all ENGL courses with three numeric values or less. To limit the wildcard list to all two-digit ENGL courses beginning with the number 6, enter a course value of ENGL 6# in the Catalog Nbr field. (In this example, the number of # signs needed to indicate all courses varies by institution.)

Recommendations

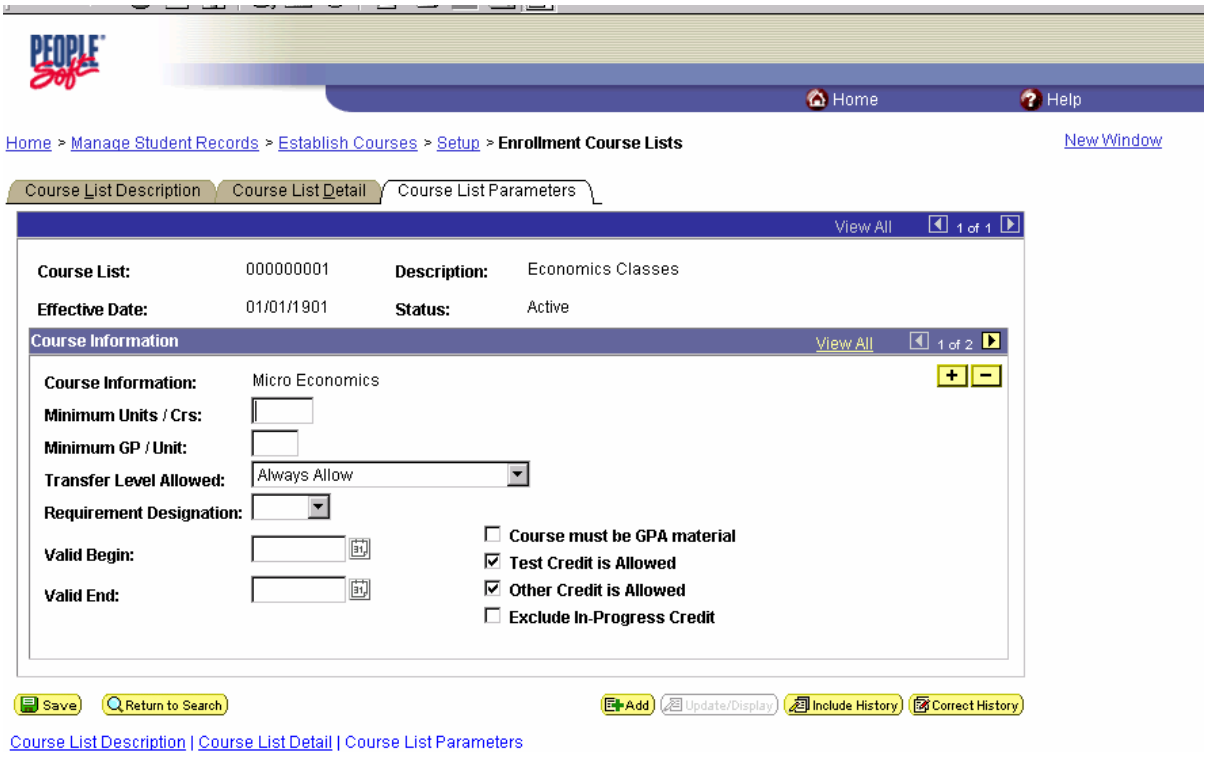
Review the setup for Academic Advising.

7.3 Course List Parameters

Use this page to establish the detail parameters for each course listed.

Page Name: Course List Parameters

Navigation: Manage Student Records → Establish Courses → Setup → Enrollment Course Lists → Course List Parameters



7.3.1 Course Information

Recommendations