Blackbaud

Student Information System

Configuration Guide for Registrar’s Office
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**Note:** Visit our Web site at www.blackbaud.com for the latest documentation and information.

*Configuration* is an important area in which you make decisions and define settings that affect the overall success of *Registrar’s Office*. If you have just installed or converted to *Registrar’s Office*, be sure to follow the procedures in the order established on the Set up Registrar’s Office page in *Administration*.

In *Registrar’s Office*, *Configuration* provides a central location for settings and features you use to customize your processes. These settings affect functions and details that can increase the efficiency of your record keeping, speed data entry, provide for security checks-and-balances, and generally optimize the performance of *Registrar’s Office*. For example, you can define the basis of your scheduling system (cycles, timetables, patterns, scheduling rules) and your grading system (marking column sets, translation tables, default comments, and calculations).

You can define business rules affecting processes in your program, such as setting a maximum number of classes students can take per term and the number of floating teachers to allow in a room per day.

With other *Configuration* features, you can define table entries to speed data entry, rename fields to reflect your organization’s terminology, hide fields, or make fields required on certain types of records. You can customize the program by creating special categories of information called attributes and attaching them to your records to aid in tracking and reporting.

**Warning:** We recommend you grant rights to *Configuration* only to users with supervisor rights.

Because *Configuration* impacts the entire program, it is closely linked to Security. We strongly recommend you allow only users with supervisor rights access to *Configuration*. With table entries in particular, it is important that you limit access to adding and editing rights to maintain consistency in your database. School records are accessible only to users with Supervisor rights.

**Warning:** Certain configuration areas are shared between *Admissions Office* and *Registrar’s Office*.

If you have *Admissions Office*, certain configuration areas are shared between *Admissions Office* and *Registrar’s Office*, including General, Academic Years, Events, Addressee/Salutations, Attributes, International, Business Rules, Tables, and Fields. For example, if you define an event record in *Registrar’s Office*, you can open the same record in *Admissions Office*. Be sure to educate users in these programs that these areas are shared. For more information about configuring *Admissions Office*, see the *Configuration Guide for Admissions Office*.

### Configuration Links

**Note:** You can also open the Configuration page by selecting **Go, Configuration** from the shell menu bar.
The Configuration page contains links to help you define settings for Registrar’s Office. To access the Configuration page, click Configuration on the navigation bar. The Configuration page appears.

Links on the Configuration page include:

**General.** Click this link to change your organization’s contact information. From the General page, you manage school records for your organization.

**Registrar Setup.** Click this link to establish the foundation of your organization’s scheduling and grading systems. For scheduling, you define cycles, timetables, patterns, and scheduling rules. For grading, you define marking column sets, translation tables, default comments, course average calculations, GPA calculations, performance categories, rank interval sets, and rank calculations.

**Academic Years.** Click this link to manage academic year records. You define an academic year record for the entire school year. Within an academic year, you define sessions and terms.

**Events.** Click this link to define calendar events for the entire organization or for one or more specific schools.

**Addressee/Salutations.** Click this link to create various addressee and salutation formats that appear throughout the program and on mailings, reports, report cards, and transcripts. Standard addressee/salutation formats can help ensure consistency.

**Attributes.** Click this link to define types and characteristics of attributes you can assign to records in the program, such as student and course records. Attributes are bits of useful information you can attach to a record for tracking or reporting purposes.

**Letters.** Click this link to define letter descriptions and associate letters with Word Merge export files.

**International.** Click this link to define international address formats.

**Business Rules.** Click this link to set standard procedures and requirements in the program. Because business rules affect the fundamental processes of the program, we recommend an administrator carefully review and implement these settings.

**Note:** Contact Customer Support at easupport@blackbaud.com to change your organization name in the program.
Tables. Click this link to access the Tables page, the central location for adding and editing Registrar’s Office tables. Using tables increases data entry speed and accuracy by providing lists of entries users can quickly access. Various preexisting table entries appear on the Tables page for your convenience. If a table entry becomes obsolete, you can make it inactive.

Fields. Click this link to view or change field characteristics for each record type. You can enter a different name for a field, require a field, and hide a field. You can view which fields are lookup fields containing table entries from which you can select.

Attendance Codes. Click this link to define absence and tardy codes. You can set up codes in two schemes, class and day codes or day-only codes.

NetClassroom. If you have the optional module NetClassroom, click this link to set up NetClassroom.

Classifications. With classifications, you determine how to group students based on the number of credits they are enrolled in.

Hold Codes. Click this link to define hold codes and restrictions for students.

Test Type Definitions. Click this link to define the subject areas for each test type.

Test Equivalents. Click this link to define corresponding test score ranges for each test type.

General Configuration

On the General page in Configuration, you can manage your organization’s basic contact information and records for schools in your organization.

Organization Information

**Note:** If you also have Admissions Office, organization information is shared between Admissions Office and Registrar’s Office.

You can define default contact information for your organization, including country, address, city, state, ZIP, and phone.
Adding organization information

1. From the Configuration page, click General. The General page appears.

![Configuration page screenshot]

Note: The organization name is the same for all accounting and school administration programs in your database.

2. Your organization’s name appears at the top of the page. Confirm your organization name appears correctly. You can contact Customer Support at eesupport@blackbaud.com to change your organization name in the program.

3. In the Country field, select the home country of your organization.

4. Enter your organization's contact information in the address and telephone fields.

5. When you exit the General page, your organization information is saved automatically.

Schools

Note: If you also have Admissions Office, school records are shared between Admissions Office and Registrar’s Office.

You can manage records for one or multiple schools. If you are installing Registrar's Office for the first time, or if you are adding a new database, a school record automatically appears using your organization’s name with all grade levels selected. Only users with Supervisor rights can add school records.

Determining whether to use one or create multiple school records is an important decision to make before beginning daily operations in Registrar’s Office. Adding or removing a school after entering data will be time-consuming. We strongly recommend you take the time to consider this decision before proceeding.

There are several reasons to consider creating more than one school:

Different scheduling setups. Different scheduling setups include different cycle days, different start and end dates, different days in session, different periods in a day, and different terms. If you have a need for different terms only, keep in mind that you can define overlapping terms.

If you have at least two groups of students that have different scheduling setup needs, you should consider setting up multiple schools.
Different locations. If you have schools with different campuses, you should consider setting up multiple schools. You can enter different addresses for each school to appear on report cards and transcripts. Creating separate school records may also make it easier to group students, faculty/staff, rooms, and courses with each school if these are not shared between schools.

Grading and attendance procedures. If you have differences only in grading or attendance procedures, you do not necessarily have to set up multiple schools.

In grading, for example, you can select only the marking columns you need to appear on grade entry screens and reports.

However, if you use Faculty Access for the Web and teachers need to enter day-only attendance, the academic year for the school must be set to track day-only attendance. If some teachers need to enter class attendance in Faculty Access for the Web, while other teachers need to enter day-only attendance in Faculty Access for the Web, you must create separate schools.

If you do require multiple schools based on different scheduling setups or different locations, you may have different grading and attendance needs as well that you can set up per school. Remember that grading and attendance differences do not necessarily mean you have to create multiple schools, but if you do need to create multiple schools for other reasons, you can easily associate the academic year for each school with the applicable attendance tracking method and each session of the year with the applicable marking columns.

Other issues to consider before deciding whether or not to create multiple schools include:

Scheduling across schools. To schedule multiple schools at once, you must use the same Academic Year table entry and the same Session table entry across schools. This also allows you to schedule resources or students in multiple schools. For example, you can schedule a student in both undergraduate and graduate classes if the academic year for each school is “2006-2007” and both years contain a “Regular” session. The date ranges do not have to be the same for each school. We recommend you use the same Term table entries, though this is not required.

Checking for conflicts. The correct setup of cycle days, days in session, first cycle day of each term, and the scheduling calendar entries for each session is necessary to correctly check for conflicts across schools. This information does not have to be the same for each school but you should verify that the information is correct before scheduling. The program determines what classes meet on the same dates at the same time by mapping cycle days to dates.

Student progression entries. For an academic year, you can associate a student with only one school on the student’s progression entry for the academic year. The student is not limited to requesting courses and enrolling in classes in that school only, but is associated with that one school when viewing or reporting on that student in the program.

Faculty/staff and room records. You can associate a faculty/staff member and a room with more than one school.

Report cards and transcripts. Each school can have its own address that appears on report cards and transcripts. You can also display grades from multiple schools together on report cards and transcripts.

Courses. Courses are specific to one school. A Course ID has to be unique only within each school. For example, you have a High School, a Performing Arts School, and a Community College, and you can track what courses a student takes at each school.

Absences. A student is absent from a specific date, not a specific school. If you mark a student absent for a date, that means the student was not present at all on that day regardless of the school the student was scheduled in on that date.

Admissions process. The admissions process is not affected by having multiple schools. An applicant can have only one active application for one school.
Adding a school

On a school record, you define the address of the school, associate grade levels with the school, and designate the school as single gender or coeducational.

1. From the Configuration page, click General. The General page appears. The schools grid is at the bottom of the page.

2. To add a new school record, click New School on the action bar. The New School screen appears.

3. In the School ID field, enter a unique identification code for the school.

4. In the Name field, enter the full name of the school.

5. The Country, Address, City, State, ZIP, and Phone fields automatically fill in with the values you entered on the General page. You can edit this information for each school, for example, if you have different campuses.
6. All grade levels are selected by default. To select specific grade levels to include, click the binoculars in the Grade levels field. The Selected Grades screen appears.

7. Select grade levels in the box on the left and use the right arrow to move them into the Include these grades box.

8. To save your selections, click OK. You return to the New School screen and the selected grade levels appear in the Grade levels field.

Note: If you designate a school as single gender, this affects other areas of the program associated with the school. For example, the Course gender field does not appear on course records associated with the school.

9. In the School gender field, select “Coed”, “Female”, or “Male” to designate whether the school is single gender or coeducational.

10. In the Current year field, the current academic year appears based on the date ranges of the academic years you define. If a current academic year has not been defined, “N/A” appears.

11. To save the school record and return to the General page, click Save and Close.
Copying a school

To save time when setting up similar school records, you can copy one school record, edit it, and then save it with a new name.

1. From the Configuration page, click General. The General page appears. The schools grid is at the bottom of the page.

2. Select the school in the grid and click Copy from on the action bar. The New School screen appears containing the same information as the selected school record, except for the school ID and name.

3. Enter a new school ID and name and make any other changes to the school record.

4. To save the school record and return to the General page, click Save and Close.

Making a school inactive

Note: You must have at least one active school.
You cannot delete a school record if it is selected on a student, faculty/staff, course, room, conduct, or academic year record or status log entry. However, if a school has been used but is no longer needed, you can mark it as inactive. Keep in mind that you must keep a school record active to view associated enrollments on student records and information on report cards and transcripts.

**Note:** To view inactive schools in the grid, mark *Show Inactive Schools*.

1. From the Configuration page, click **General**. The General page appears. The schools grid is at the bottom of the page.

![Configuration page](image)

2. To open a school record, select the school in the grid and click **Open** on the action bar. The school screen appears.

3. Mark **Inactive** beside the **School ID** field.

![School screen](image)

4. To save the school record and return to the General page, click **Save and Close**.
Registrar Setup

In Registrar Setup in Configuration, you establish the foundation of your schools’ scheduling and grading systems, such as how to schedule classes, organize grading periods, and calculate grades.

Cycles

In a cycle, you define the days of the schedule. How you define a cycle depends on the rotation of classes in a school. Examples of cycles you might create include:

- Mon, Tue, Wed, Thu, Fri
- A, B, C, D4, D5, D6
- Red, Blue
- A, B, C, D, E
- A, B

The program contains a default cycle of Monday through Friday. You can create as many cycles as you need, for example, you can define a cycle to use with a regular session of an academic year and another to use with the summer session.

**Note:** In each cycle, make sure you order the days chronologically.

When you define a timetable, you associate a cycle and define the bell schedule for each cycle day. When defining a session of an academic year, you associate a timetable and specify the first cycle day of each term in the session. When you add scheduling calendar entries to a session record, you can designate whether to skip cycle days. You can readjust cycle days using the scheduling calendar.

You cannot delete a cycle after it is in use, but you can edit it.

- **Adding a cycle**
  1. From the Configuration page, click Registrar Setup.
  2. From the list on the left, select Cycles.
3. To add a new cycle, click **New Cycle** on the action bar. The New Cycle screen appears.

![New Cycle Screen]

4. In the **Cycle** field, enter a name for the cycle.

**Note:** In Scheduling Options, you can select to display cycle days by display code or by day.

5. In the **Day** column, enter a designation for the day.

6. In the **Description** column, enter a description of the day.

7. In the **Display Code** column, enter a one-character code for display purposes. We recommend you enter a unique code for each day.

![Display Code Screen]

8. Use the **Up** and **Down** buttons to arrange the days chronologically. The order is important because the program automatically assigns cycle days to dates in terms based on the associated cycle.

9. To save the cycle and return to the Registrar Setup page, click **OK**.

- **Editing a cycle in use**
  
  You can add, delete, rename, or change the order of cycle days.

  1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Cycles**.

![Image of a computer screen with a list of options and a selected cycle]

3. To edit a cycle, select the cycle and click **Open** on the action bar. The cycle screen appears.

![Image of a cycle screen with days of the week and a table]

4. Make changes to the cycle and click **OK**.

5. A message appears stating that the cycle is in use and saving the changes to this cycle will update any information using this cycle. To continue, click **Yes**. The Update Setup Process screen appears.

![Image of an update setup process screen]

6. A list of academic years and sessions currently using the cycle and without class attendance entered appears. For each academic year and session in which to update the cycle, mark the checkbox in the **Include?** column.

The program stores copies of the previous version of the cycle so the information remains the same for those academic years and sessions you are not updating.
When to restrict class meetings to period times.

Restricting Class Meetings to Period Times

In a timetable, you define the periods in each cycle day. The timetable represents a school’s bell schedule for each cycle day. You can define multiple timetables, for example, so you can use different timetables with different schools.

On the Periods tab, you define periods and the start and end times of periods in each cycle day and designate whether class meetings must have the same start and end times of periods defined on the timetable. For more information, see “Restricting Class Meetings to Period Times” on page 15.

When you define a pattern, you associate a timetable with the pattern. You can automatically create blocks of meeting times in the pattern using the timetable. Be sure to completely define each cycle day in the timetable before using the timetable to create blocks in the pattern.

When defining restrictions on room, teacher, and course records, you can restrict meetings by period.

You cannot delete a timetable after it is in use, but you can edit it.

Restricting Class Meetings to Period Times

On each timetable, you can designate that class meetings can take place only within the start and end times of periods by marking the Allow class meetings to occur only using periods checkbox.

When you name periods on timetables, you name time frames such as Period 1, Period 2, etc. or A Block, B Block, etc. This does not necessarily mean you need class meetings to occur only within these start and end times. Follow these guidelines for whether to restrict class meetings to the start and end times entered.

When to restrict class meetings to period times. In a day, all classes start and end at the same time for each time frame represented. For example, you have six time frames in the day in which classes can meet (8:00-8:50 = Period 1, 9:00-9:50 = Period 2, etc.).

When restricting class meetings to occur only using periods, throughout the program, the name of the period and the start and end times entered mean the same thing.

When to not restrict class meetings to period times. Throughout a day, start and end times vary for classes. For example, you do not have specific times that classes must meet as long as they can last 50 minutes. So classes can meet from 8:00-8:50, 8:05-8:55, 8:10-9:00.
Also, if time frames overlap each other. For example, on the same day, one class meets from 8:00-8:50 while another class meets from 8:30-9:20.

When not restricting class meetings to occur only using periods, throughout the program, the name of the period on the timetable does not represent the start and end times entered, but is used only to validate that class meetings occur sometime during the time frames entered.

- Adding a timetable
  1. From the Configuration page, click Registrar Setup.
  2. From the list on the left, select Timetables.


4. In the Timetable field, enter a name for the timetable.
5. In the Description field, enter a description of the timetable.
6. In the Cycle field, select the cycle days to associate with the timetable.
7. On the Periods tab, you define the periods in each cycle day. To require that all patterns you associate with the timetable are restricted to full periods, mark Allow class meetings to occur only using periods.
   If you mark this checkbox, keep in mind that you can define a meeting to last multiple periods, but you cannot define a meeting to overlap any period.
If you do not mark **Allow class meetings to occur only using periods**, patterns you associate with the timetable are not restricted to full periods and you freely enter start and end times instead of selecting periods when defining meeting blocks.

![New Timetable window](image)

**Note:** To add rows, click **Insert** on the action bar.

8. For the first cycle day that appears, define periods in rows underneath the row for the cycle day. In the **Period** column, select or enter the periods. The period’s description appears in the **Description** column. If you enter a new period, a message appears asking if you want to add it to the **Period** table.

**Note:** Periods within the same cycle day cannot overlap. The amount of time within one cycle day cannot exceed 24 hours. You can assign a period once in each cycle day.

9. In the **Start Time** column, enter each period’s start time.

10. In the **End Time** column, enter each period’s end time.

![New Timetable window](image)

**Note:** To expand or collapse the period rows for a cycle day, double-click the cycle day row.
11. To save time when defining periods in a timetable, you can synchronize other cycle days in the grid with the currently selected cycle day. To repeat the same periods as the selected day for all days, click **Synchronize All** on the action bar. To repeat the same periods as the selected day for the days below the selected day, click **Synchronize Remaining**. You can edit the periods for each cycle day after synchronizing, the periods do not have to be the same for each cycle day.

**Note:** Using the grid view, you can see a complete schedule of the timetable in a table format.

12. To review the timetable in a grid view, click **Grid View** on the action bar.

![Grid View](image)

**Note:** If cycle days contain any of the characters ! ` [ ] you cannot export this grid to *Excel*.

13. You can select filters for viewing the timetable grid.
   - In the **Interval** field, select “1 hour”, “30 min”, “15 min”, “10 min”, or “5 min”.
   - In the **Start grid at** field, select the earliest time to appear.
   - In the **End grid at** field, select the latest time to appear.

**Note:** To return to the design view, click **Design View** on the action bar.

14. Each period appears in a different color. To change the font color or color of a period, click the applicable color box to the right of the grid and select a new color.

15. To save the timetable and return to the Timetables page, click **Save and Close**.

- **Copying a timetable**
  To save time when setting up similar timetables, you can copy a timetable, edit it, and then save it with a new name.
  1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Timetables**.

3. Select the timetable and click **Copy from** on the action bar. A timetable screen appears containing the same information as the selected timetable, except for the timetable name.

Note: To expand or collapse the period rows for a cycle day, double-click the cycle day row.

4. In the **Timetable** field, enter a new timetable name and make any other changes to the timetable.
5. To save the timetable and return to the Timetables page, click **Save and Close**.

**Editing a timetable in use**

You can add, delete, or change the times of a period.

1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Timetables**.
3. To open a timetable, select the timetable and click **Open** on the action bar. The timetable screen appears.

4. Make changes to the timetable and click **Save and Close** on the toolbar.

5. A message appears stating that the timetable is in use and saving the changes to this timetable will update any information using this timetable. To continue, click **Yes**. The Update Setup Process screen appears.

6. A list of academic years and sessions currently using the timetable and without class attendance entered appears. For each academic year and session in which to update the timetable, mark the checkbox in the **Include?** column.

   The program stores copies of the previous version of the timetable so the information remains the same for those academic years and sessions you are not updating.
7. **Click OK.** A screen appears so you can review the information that will be updated. Areas that may be updated include patterns, room restrictions, course restrictions, faculty restrictions, class meetings, scheduling scenarios, terms, and scheduling calendars.

![Update Setup Process](image)

8. **Click OK.** When the update is complete, this screen closes and you return to the Timetables page. A copy of the previous version of the timetable remains in the grid. The updated timetable appears with a number at the end. New copies of the patterns that use the timetable are created with the same number.

**Patterns**

Patterns are scheduling templates you can associate with courses to speed up the scheduling of classes. A pattern determines when classes of the course meet. Each pattern contains groups of meeting times, or “blocks”. Blocks represent each possibility in which a class can be scheduled. In each block, you define the individual meeting times that the class meetings occur. When generating the master schedule, the program uses the meeting times in a block to assign meeting times to classes of a course.

For example, a class meets Monday through Friday at the same time every day and six periods are in each day. A pattern represents all the possibilities in which this class could meet; in this case, there are six possibilities. You can create a block for each of these possibilities and define the individual meeting times within each block. One block is a class meeting Monday through Friday during first period. Another block is a class meeting Monday through Friday during second period, and so on.

When defining a session of an academic year, you designate the patterns available for that session. When defining restrictions for an academic year on the Restrictions 2 tab of course records, you can restrict the course by pattern and select the pattern classes of the course use.

You can use the Pattern Wizard to quickly create blocks in the pattern based on the associated timetable and selected pattern type. You can also enter meeting times manually.

Using the Pattern Wizard, you can add extra meetings for specific times, such as an extra lab meeting. Use the Pattern Wizard if you have one course for which you want to create an extra meeting. If you have two courses that you want to link to occur before or after each other, use course rules. For more information about adding rules to course records, see the Courses chapter of the Records Guide for Registrar’s Office.

You cannot delete a pattern after it is in use, but you can edit it.

- **Adding a pattern manually**
  1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Patterns**.

3. To add a new pattern, click **New Pattern** on the action bar. The New Pattern screen appears.

4. In the **Pattern** field, enter a name for the pattern.
5. In the **Description** field, enter a description of the pattern.
6. In the **Timetable** field, select a timetable to associate with the pattern.
7. If all meetings in a block must last the same amount of time, mark **Meetings for a block must be the same length in time**. If you do not mark this checkbox, meetings can have different lengths.
8. If all blocks in the pattern should have the same number of meetings, mark **Blocks must have the same number of meetings**. If you do not mark this checkbox, blocks can have different numbers of meetings.
9. Blocks appear in the grid at the bottom of the Pattern screen. You define meeting times in blocks. To define a block for the pattern, click **New Block** on the action bar. The New Block screen appears.

10. In the **Block** field, enter a name for the block.

**Note:** You can define multiple meeting times within the same cycle day. Meetings in the same cycle day cannot overlap.

11. In the **Cycle Day** column, select each cycle day for which to define meeting times. In the **Description** column, the description of the cycle day automatically appears.

12. If you marked **Allow class meetings to occur only using periods** on the timetable selected for the pattern, the **Period**, **Period Description**, and **Length in Periods** columns appear.
   a. In the **Period** column, select the period of the meeting. The period’s description appears in the **Period Description** column.
   b. In the **Length in Periods** column, enter how many periods comprise the meeting.

13. If you did not mark **Allow class meetings to occur only using periods** on the timetable selected for the pattern, the **Start Time** and **End Time** columns appear.
   a. In the **Start Time** column, enter the meeting’s start time.
b. In the **End Time** column, enter the meeting’s end time. A meeting cannot exceed 24 hours.

14. To save the block and open a new block, click **Save and New**. Continue adding the blocks needed in the pattern.

To save the block and return to the Pattern screen, click **OK**.

---

**Note:** To edit a block, double-click the block on the grid. To return to the design view to edit the pattern, click **Design View** on the action bar.
15. To review the blocks and meeting times defined in the Design View in a grid format, click **Grid View** on the action bar.

![Grid View](image)

16. You can select filters for viewing the pattern grid.
   - In the **Display** field, select “By Day” or “By Block”. This determines whether days or blocks appear across the top of the grid.
   - The **Using** field appears only if you marked **Allow class meetings to occur only using periods** on the timetable. In the **Using** field, select “Time” or “Period”. This determines whether times or periods appear down the side of the grid.
   - In the **Interval** field, select “1 hour”, “30 min”, “15 min”, “10 min”, or “5 min”. In the **Start grid at** field, select the earliest time to appear. In the **End grid at** field, select the latest time to appear. These fields are disabled if you select “Period” in the **Using** field.

17. Each day or block appears in the grid in a different color. To change the font color or color of a day or block, click the applicable color box to the right of the grid and select a new color.

18. To save the pattern record and return to the Patterns page, click **Save and Close**.

- **Adding a pattern using the Pattern Wizard**
  You can use a Pattern Wizard to create blocks in a pattern based on a timetable and pattern type. If you open the Pattern Wizard after blocks exist, a message appears stating that if you run the Pattern Wizard, the program removes all existing blocks.
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Patterns**.
3. To add a new pattern, click **New Pattern** on the action bar. The New Pattern screen appears.

4. In the **Pattern** field, enter a name for the pattern.

5. In the **Description** field, enter a description of the pattern.

6. In the **Timetable** field, select a timetable to associate with the pattern.

7. If all meetings in a block must last the same amount of time, mark **Meetings for a block must be the same length in time**. If you do not mark this checkbox, meetings can have different lengths.

8. If all blocks in the pattern should have the same number of meetings, mark **Blocks must have the same number of meetings**. If you do not mark this checkbox, blocks can have different numbers of meetings.


10. In the **Pattern Type** field, select “Same period each day”, “Rotating”, “Lab”, “Every other day”, “MWF”, or “TTh”. For an example of how each pattern type creates blocks based on a sample timetable, see “Examples of Pattern Types Created by Pattern Wizard” on page 30.

**Note:** Pattern types are program-defined, you cannot add pattern types.
11. In the **Timetable** field, the timetable selected for the pattern automatically appears. The program uses the periods in the timetable to generate blocks. You can select a different timetable.

12. In the **Cycle day** field, select the cycle day on the timetable to determine what period start and end times to use to create blocks. This field is enabled only if **Allow class meetings to occur only using periods** is not marked on the timetable.

13. If you selected “Lab” in the **Pattern Type** field, the **Length of extra meetings** field is enabled. Enter how long each extra meeting lasts. If you marked **Allow class meetings to occur only using periods** on the timetable, enter the length in periods. If you did not mark **Allow class meetings to occur only using periods** on the timetable, enter the length in minutes. You can enter up to four digits but no decimals.

14. If you selected “Every other day” in the **Pattern Type** field, the **Start day** field is enabled. Select “First day” or “Second day”.  

15. If you selected “Lab” in the **Pattern Type** field, the **Days to add an extra meeting** box is enabled. Select the cycle days to which to add the extra meetings. If you marked **Allow class meetings to occur only using periods** on the timetable, the periods of the day the extra meetings are added to determine the times of the extra meetings.

16. If you selected “Lab” in the **Pattern Type** field, the **Extra meetings occur** field is enabled. Select “Before regular meetings”, “After regular meetings”, or “Specific times”. If you select “Before regular meetings”, the start and end times of the extra meetings appear immediately before the regular meetings on the selected days. If you select “After regular meetings”, the start and end times of the extra meetings appear immediately after the regular meetings on the selected days. If you select “Specific times” but did not mark **Allow class meetings to occur only using periods** on the timetable, the **Start time** and **End time** fields appear for you to enter the times. If you select “Specific times” and you marked **Allow class meetings to occur only using periods** on the timetable, the **Start period** field appears for you to select the period.

**Note:** You can edit a pattern created using the pattern wizard.

17. When you are ready to create blocks, click **Create Now**. You return to the New Pattern screen and the blocks appear in the grid.

18. To open and edit a block, select the block and click **Open** on the action bar.

**Note:** To edit a block, double-click the block on the grid. To return to the design view to edit the pattern, click **Design View** on the action bar.
19. To view blocks and meeting times in a grid format, click **Grid View** on the action bar.

![Grid View](image)

20. You can select filters for viewing the pattern grid.
   - In the **Display** field, select “By Day” or “By Block”. This determines whether days or blocks appear across the top of the grid.
   - The **Using** field appears only if you marked **Allow class meetings to occur only using periods** on the timetable. In the **Using** field, select “Time” or “Period”. This determines whether times or periods appear down the side of the grid.
   - In the **Interval** field, select “1 hour”, “30 min”, “15 min”, “10 min”, or “5 min”. In the **Start grid at** field, select the earliest time to appear. In the **End grid at** field, select the latest time to appear. These fields are disabled if you select “Period” in the **Using** field.

21. Each day or block appears in the grid in a different color. To change the font color or color of a day or block, click the applicable color box to the right of the grid and select a new color.

22. To save the pattern record and return to the Patterns page, click **Save and Close**.

- **Editing a pattern in use**
  You can add, delete, or change the times of a meeting in a block. You can add or delete a block.
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Patterns**.
3. To open a pattern, select the pattern and click **Open** on the action bar. The pattern screen appears.

4. Make changes to the pattern and click **Save and Close** on the toolbar.

5. A message appears stating that the pattern is in use and saving the changes to this pattern will update any information using this pattern. To continue, click **Yes**. The Update Setup Process screen appears.

6. A list of academic years and sessions currently using the pattern and without class attendance entered appears. For each academic year and session in which to update the pattern, mark the checkbox in the **Include?** column.

The program stores copies of the previous version of the pattern so the information remains the same for those academic years and sessions you are not updating.
7. Click **OK**. A screen appears so you can review the information that will be updated. Areas that may be updated include timetables, patterns, room restrictions, course restrictions, faculty restrictions, class meetings, scheduling scenarios, terms, and scheduling calendars.

8. Click **OK**. When the update is complete, this screen closes and you return to the Patterns page. A copy of the previous version of the pattern remains in the grid. The updated pattern appears with a number at the end.

**Examples of Pattern Types Created by Pattern Wizard**

We provide examples of how the Pattern Wizard generates blocks for each pattern type. For these example, we are using a Monday through Friday cycle and these are the periods for each cycle day in our timetable.

<table>
<thead>
<tr>
<th>Period</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td>P2</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td>P3</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td>P4</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td>P5</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td>P6</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td>P7</td>
<td>2:00-2:50</td>
</tr>
</tbody>
</table>
### Same Period Each Day

Each period becomes a block. Each block contains a meeting for each day the period is defined using the times of the period on that day.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Mon</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td></td>
<td>Tue</td>
<td>8:00-8:50</td>
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<tr>
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<td>Wed</td>
<td>8:00-8:50</td>
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<td>Fri</td>
<td>8:00-8:50</td>
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<td>B</td>
<td>Mon</td>
<td>9:00-9:50</td>
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<td>9:00-9:50</td>
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<td>12:00-12:50</td>
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<tr>
<td></td>
<td>Fri</td>
<td>12:00-12:50</td>
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</tbody>
</table>
Rotating

Each period becomes a block. In the first block, the first meeting is the period defined using the times of the period on that day. The program determines the remaining meetings by moving the meeting to the next period for the next cycle day.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Mon</td>
<td>1:00-1:50</td>
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<tr>
<td></td>
<td>Tue</td>
<td>1:00-1:50</td>
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<td>1:00-1:50</td>
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<tr>
<td>G</td>
<td>Mon</td>
<td>2:00-2:50</td>
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<td></td>
<td>Fri</td>
<td>2:00-2:50</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Mon</td>
<td>8:00-8:50</td>
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<tr>
<td></td>
<td>Tue</td>
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<td></td>
<td>Fri</td>
<td>2:00-2:50</td>
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</tbody>
</table>
### Lab

The Lab pattern type generates blocks in the same way as the Same Period Each Day pattern type, except you can add an extra meeting to specific cycle days.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Mon</td>
<td>11:00-11:50</td>
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<tr>
<td></td>
<td>Tue</td>
<td>12:00-12:50</td>
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<td>Fri</td>
<td>8:00-8:50</td>
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<td>E</td>
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<td>12:00-12:50</td>
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<td></td>
<td>Fri</td>
<td>11:00-11:50</td>
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</tbody>
</table>
You specify the length of the extra meetings and when the extra meetings occur. The extra meetings must have the same start and end times. You designate when the extra meeting appears: immediately before regular meetings, immediately after regular meetings, or at specific times. In this example, we add a lab meeting on Wednesdays from 3:00-3:50.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Mon</td>
<td>8:00-8:50</td>
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<tr>
<td></td>
<td>Tue</td>
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<td>Wed</td>
<td>3:00-3:50</td>
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<td></td>
<td>Thu</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>11:00-11:50</td>
</tr>
</tbody>
</table>
## Every Other Day

Each period becomes a block. Each block contains a meeting for every other day the period is defined using the times of the period on that day, starting with either the first or second day of the cycle. It is possible to have the same meetings on consecutive days if there are an odd number of cycle days. For example, if you have five days, and the first, third, and fifth days have meetings, the cycle repeats and the first day immediately follows the fifth day.

In this example, we are using a Monday through Friday cycle so selecting to start with the first cycle day is the same as a MWF pattern type and selecting to start with the second day of the cycle is the same as a TTh pattern type. This pattern type works best when you are not using a Monday through Friday cycle.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>Mon</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td></td>
<td>Tue</td>
<td>12:00-12:50</td>
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<td>Wed</td>
<td>12:00-12:50</td>
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<td>Wed</td>
<td>3:00-3:50</td>
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<td>12:00-12:50</td>
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<td>F</td>
<td>Mon</td>
<td>1:00-1:50</td>
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<td></td>
<td>Fri</td>
<td>2:00-2:50</td>
</tr>
</tbody>
</table>
MWF

Each period becomes a block. Each block contains a meeting for every other day the period is defined using the times of the period on that day, starting with the first day of the cycle. This pattern type works best when you have defined your cycle days as Monday through Friday.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Mon</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td>B</td>
<td>Mon</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td>C</td>
<td>Mon</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td>D</td>
<td>Mon</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td>E</td>
<td>Mon</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td>F</td>
<td>Mon</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td>G</td>
<td>Mon</td>
<td>2:00-2:50</td>
</tr>
<tr>
<td></td>
<td>Wed</td>
<td>2:00-2:50</td>
</tr>
<tr>
<td></td>
<td>Fri</td>
<td>2:00-2:50</td>
</tr>
</tbody>
</table>
Each period becomes a block. Each block contains a meeting for every other day the period is defined using the times of the period on that day, starting with the second day of the cycle. This pattern type works best when you have defined your cycle days as Monday through Friday.

<table>
<thead>
<tr>
<th>Block</th>
<th>Cycle Day</th>
<th>Meeting Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Tue</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>8:00-8:50</td>
</tr>
<tr>
<td>B</td>
<td>Tue</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>9:00-9:50</td>
</tr>
<tr>
<td>C</td>
<td>Tue</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>10:00-10:50</td>
</tr>
<tr>
<td>D</td>
<td>Tue</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>11:00-11:50</td>
</tr>
<tr>
<td>E</td>
<td>Tue</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>12:00-12:50</td>
</tr>
<tr>
<td>F</td>
<td>Tue</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>1:00-1:50</td>
</tr>
<tr>
<td>G</td>
<td>Tue</td>
<td>2:00-2:50</td>
</tr>
<tr>
<td></td>
<td>Thu</td>
<td>2:00-2:50</td>
</tr>
</tbody>
</table>

Marking Column Sets

You establish marking columns to organize time frames in which grades and comments are entered for classes. Examples of marking columns are Semester 1, Semester 2, and Final.

**Note:** Be sure to use the same table entry if you are using a marking column in multiple marking column sets, such as Final, so the grade information lines up correctly on report cards and transcripts.

You define marking columns in sets. This enables you to use different marking column sets for different schools, for example, if your law school uses different marking columns from your undergraduate and graduate school. This also enables you to use different marking columns for different sessions.

When defining marking columns in a set, you associate each marking column with a term or terms. For example, associate Semester 1 with the Fall term. A course must be scheduled in at least one of the terms to be graded in the marking column. Associating marking columns with terms ensures calculations are calculated correctly and appear correctly on report cards and transcripts.

When you define a session of an academic year, you associate a marking column set. On course records, you associate marking columns with the course and define additional grading information.
You cannot delete a marking column set if the set is associated with a session. You cannot delete a marking column from the marking column set or remove a term association from a marking column if information exists for the marking column in the program, such as grades in the marking column in Grades or information on the Grading tab on course records in Records.

**Note:** Marking column calculations generate a marking column grade based on other marking column grades.

Make sure you completely set up and order marking columns in each set chronologically. This affects how the marking columns appear throughout the program. This is important before creating marking column calculations or allowing teachers to create marking column calculations in Faculty Access for the Web. Marking columns included in a marking column calculation in Faculty Access for the Web must be listed before the marking column being calculated. If you change the order of the marking columns in the set, you can invalidate calculations in Faculty Access for the Web.

- **Adding a marking column set**
  1. From the Configuration page, click Registrar Setup.
  2. From the list on the left, select Marking Column Sets.
  3. To add a new marking column set, click New Marking Column Set on the action bar. The New Marking Column Set screen appears.
  4. In the **Name** field, enter a name for the marking column set.
  5. In the **Description** column, select or enter the descriptions of the marking columns. If you enter a new description, a message appears asking if you want to add it to the Marking Column table.
6. In the Display Text column, enter how each marking column appears in column headers in grades, report cards, and transcripts. We recommend entering as few characters as possible because the display area can be shortened depending on the area available.

7. In the Include column, designate whether to associate all or selected terms with each marking column. If you select “All”, all terms are associated with the marking column. If you choose “Selected”, the Selected Terms screen appears for you to select the terms to associate with the marking column.

8. Select the term to associate and click the right arrow to move the term to the Include these terms box. To save your selection and return to the New Marking Column Set screen, click OK.

9. To save the marking column set and return to the Marking Columns page, click Save and Close.

Translation Tables

Translation tables contain your grading schemes and instruct the program how to translate grades. On each translation table, you enter valid ranges for numeric grades and grade points. Two views appear on the translation table, the Grade view and the GPA view:

- In the Grade view, define each grade you use, such as A, B, C. Enter each grade and designate whether it receives credit, whether to use it in calculations, the numeric equivalent, and the range of numeric values that translate to the grade.
In the GPA view, define how the numeric values translate to GPAs. For each GPA type, designate the GPA equivalent of the numeric value, the range of grade point values that translate to the GPA, and whether it is used in GPA calculations.

On course records, you define grading information and associate translation tables with marking columns. You cannot delete a translation table after it is associated with a marking column on a course record, but you can make a translation table inactive so you cannot select it on new course records.

If you change the grid values in a translation table after grades exist, a message appears stating that existing grades and calculations may be invalidated and asking if you want to continue. If you change the valid numeric grades or grade points ranges so that an existing grade or GPA value no longer falls within the range, a message appears stating that existing values may be invalidated. If you continue, the values not within the range are deleted.

Adding a translation table

1. From the Configuration page, click Registrar Setup.
2. From the list on the left, select Translation Tables.
3. To add a new translation table, click New Translation Table on the action bar. The New Translation Table screen appears.
4. In the Translation Table field, enter a name for the translation table.
5. If your organization has more than one active school record, the School box appears. In the Schools box, mark checkboxes for the schools to associate with the translation table. Only the courses associated with the school can use the translation table.
6. In the **Valid numeric grades from [ ] to [ ]** fields, enter the lowest and highest numeric values permitted in a marking column.

7. In the **Valid grade points from [ ] to [ ]** fields, enter the lowest and highest GPA values permitted in a marking column.

**Note:** On a course record, you can designate the values that can be entered in a marking column: “Grade”, “Numeric”, or “Both”. “Grade” refers to the **Grade** column on the translation table.

8. In the **Grade** column of the grid, enter the grades you award. Complete the row for each grade you enter. List the grades in descending order, such as A+, A-, B+, B-, C+. Descending order is important for calculations to occur correctly.

   At the end of the list, include special cases. For example, include INC for incomplete grades.

   You must include NG in the table. NG denotes No Grade. NG replaces blank grades during calculations. The program warns you if you do not enter NG in a row and adds it for you.

**Note:** If you enter a grade during grade entry that is not accounted for on the associated translation table, you receive a message that it is an invalid grade.

   The **Grade** column is typically used for letter grades, but you can enter numeric ratings, such as 1, 2, 3, 4, and 5.

9. In the **Grade Type** column, specify which enrollment types can use each grade:
   - Standard — for Regular or Independent Study enrollments. Make sure that you never enter Standard grades for Pass/Fail students because the program will not translate grades to Pass/Fail grades such as P or F.
   - Pass — for Pass/Fail, Regular, or Independent Study enrollments. If the **Credit Awarded** checkbox is marked for a Pass grade type, Pass/Fail students will earn credit for that grade. Pass grades are not included in grade calculations (particularly GPA calculations).
   - Fail — for Pass/Fail, Regular, or Independent Study enrollments. If the **Credit Awarded** checkbox is not marked for a Fail grade type, Pass/Fail students will earn not credit for that grade. Fail grades are not included in grade calculations (particularly GPA calculations).

Because Regular and Pass/Fail enrollments use the same grade types, be careful how you mark settings such as **Use in Course Avg** and **Use in Performance** on the translation table because the settings apply to both types of enrollments. Consider setting this information based on the Regular enrollment and using the values in **Grades for Use in Calculations** to exclude grades for Pass/Fail enrollments.

   - Audit — for Audit enrollments. If you want audit grades included in course average and performance calculations, mark the **Use in Course Avg** and **Use in Performance** checkboxes.

   Do not create grades for P (Pass) and F (Fail). You should create translations for other grades (such as A through F) and then specify which of these grades are Pass and Fail.

10. To give a student credit for the grade, mark **Credit Awarded**. For example, do not mark this checkbox for failing grades.

11. To include the grade in course average calculations, mark **Use in Course Avg**.

12. To include the grade in performance categories, mark **Use in Performance**.

**Warning:** You must enter numeric equivalents and cutoff values if you plan to calculate course averages and GPAs.

13. In **Numeric Equivalent**, enter the numeric value of the grade to use in calculations. The program uses this value to assign numeric grades to letter grades during calculations.
For example:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Numeric Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>100.00</td>
</tr>
<tr>
<td>A</td>
<td>95.00</td>
</tr>
<tr>
<td>A-</td>
<td>92.00</td>
</tr>
<tr>
<td>B+</td>
<td>88.00</td>
</tr>
<tr>
<td>B</td>
<td>85.00</td>
</tr>
<tr>
<td>B-</td>
<td>82.00</td>
</tr>
<tr>
<td>C+</td>
<td>78.00</td>
</tr>
<tr>
<td>C</td>
<td>75.00</td>
</tr>
<tr>
<td>C-</td>
<td>72.00</td>
</tr>
<tr>
<td>D+</td>
<td>69.00</td>
</tr>
<tr>
<td>D</td>
<td>65.00</td>
</tr>
<tr>
<td>F</td>
<td>60.00</td>
</tr>
</tbody>
</table>

14. In **Cutoff Value**, enter the lowest numeric value that translates to the grade. The program determines the highest numeric value from the cutoff value in the row above.

For example:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Cutoff Value</th>
<th>Range Created by Cutoff Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>98.00</td>
<td>98.00 and above</td>
</tr>
<tr>
<td>A</td>
<td>95.00</td>
<td>95.00 to 97.99</td>
</tr>
<tr>
<td>A</td>
<td>90.00</td>
<td>90.00 to 94.99</td>
</tr>
<tr>
<td>B+</td>
<td>88.00</td>
<td>88.00 to 89.99</td>
</tr>
<tr>
<td>B</td>
<td>85.00</td>
<td>85.00 to 87.99</td>
</tr>
<tr>
<td>B-</td>
<td>80.00</td>
<td>80.00 to 84.99</td>
</tr>
<tr>
<td>C+</td>
<td>78.00</td>
<td>78.00 to 79.99</td>
</tr>
<tr>
<td>C</td>
<td>75.00</td>
<td>75.00 to 77.99</td>
</tr>
<tr>
<td>C-</td>
<td>70.00</td>
<td>70.00 to 74.99</td>
</tr>
<tr>
<td>D+</td>
<td>68.00</td>
<td>68.00 to 69.99</td>
</tr>
<tr>
<td>D</td>
<td>61.00</td>
<td>61.00 to 67.99</td>
</tr>
</tbody>
</table>
The program uses the **Cutoff Value** column to translate calculated numeric grades back to grades in the **Grades** column. For example, if you award A+ for calculated grades from 98.00 to 100.00, enter 98.00 as the cutoff value for A+.

The program also uses the **Cutoff Value** column to translate numeric grades recorded in *Faculty Access for the Web* to grades during the posting process, if you select to post as letter grades in the Post from FAWeb utility.

**Note:** The program uses the **Numeric Equivalent** column to translate grades to numeric grades for calculations, while it uses the range created by the **Cutoff Value** column to translate numeric grades into the grades in the **Grades** column.

Do not interpret the **Numeric Equivalent** and **Cutoff Value** columns as a range from left to right. The program uses the two columns separately. The program uses the **Numeric Equivalent** column to translate grades to numeric grades for calculations, while it uses the range created by the **Cutoff Value** column to translate numeric grades into the grades in the **Grades** column.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Cutoff Value</th>
<th>Range Created by Cutoff Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>0.00</td>
<td>0.00 to 60.99</td>
</tr>
</tbody>
</table>

![Image of the grade table]

**Note:** You can add GPA types to the GPA table from this screen. Click **New GPA Type** on the action bar.
15. To go to the GPA view, select **View, GPA View** from the menu bar. Rows appear for each row in the Grade view and columns appear for numeric values and grade equivalents. Additional columns appear for each GPA type defined on the **GPA** table.

![GPA View Image]

**Note:** You can enter additional rows of numeric values in the GPA view. For example, you can define each numeric grade separately, such as 100, 99, 98.

16. In the **Numeric Value** column, the cutoff values appear from the Grade view. In this column, define the lowest numeric value that translates to the GPA equivalent. You can edit existing or define additional rows.

In the **Grade Equivalent** column, the grade equivalent of the numeric equivalent appears, determined by the cutoff numeric values defined in the Grade view. You cannot edit this column.

17. Further define each GPA type in the additional columns that appear. Subcolumns appear for each GPA type. In the **GPA Equivalent** column, enter the grade point value to assign to each grade in GPA calculations. Values appear by default based on your valid grade points range, but you can edit the values.

For example:

<table>
<thead>
<tr>
<th>Numeric Value</th>
<th>Grade</th>
<th>GPA Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>98.00</td>
<td>A+</td>
<td>4.00</td>
</tr>
<tr>
<td>95.00</td>
<td>A</td>
<td>3.75</td>
</tr>
<tr>
<td>90.00</td>
<td>A-</td>
<td>3.25</td>
</tr>
<tr>
<td>88.00</td>
<td>B+</td>
<td>3.00</td>
</tr>
<tr>
<td>85.00</td>
<td>B</td>
<td>2.75</td>
</tr>
<tr>
<td>80.00</td>
<td>B-</td>
<td>2.25</td>
</tr>
<tr>
<td>78.00</td>
<td>C+</td>
<td>2.00</td>
</tr>
<tr>
<td>75.00</td>
<td>C</td>
<td>1.75</td>
</tr>
</tbody>
</table>
18. A Cutoff Value column appears if you mark the business rule to show this column. In the Cutoff Value column, you can enter the lowest grade point value to translate back to the grade. The program determines the highest grade point value from the cutoff value in the row above.

For example:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Cutoff Value</th>
<th>Range Created by Cutoff Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>4.00</td>
<td>4.00 and above</td>
</tr>
<tr>
<td>A</td>
<td>3.75</td>
<td>3.75 to 3.99</td>
</tr>
<tr>
<td>A-</td>
<td>3.25</td>
<td>3.25 to 3.74</td>
</tr>
<tr>
<td>B+</td>
<td>3.00</td>
<td>3.00 to 3.24</td>
</tr>
<tr>
<td>B</td>
<td>2.75</td>
<td>2.75 to 2.99</td>
</tr>
<tr>
<td>B-</td>
<td>2.25</td>
<td>2.25 to 2.74</td>
</tr>
<tr>
<td>C+</td>
<td>2.00</td>
<td>2.00 to 2.24</td>
</tr>
<tr>
<td>C</td>
<td>1.75</td>
<td>1.75 to 1.99</td>
</tr>
<tr>
<td>C-</td>
<td>1.25</td>
<td>1.25 to 1.74</td>
</tr>
<tr>
<td>D+</td>
<td>1.00</td>
<td>1.00 to 1.24</td>
</tr>
<tr>
<td>D</td>
<td>0.75</td>
<td>0.75 to 0.99</td>
</tr>
<tr>
<td>F</td>
<td>0.00</td>
<td>0.00 to 0.74</td>
</tr>
</tbody>
</table>

The program uses the Cutoff Value column to translate calculated grade point values back to the grade in the Grade Equivalent column. For example, if you award an A+ for a calculated grade point value of 4.00 or above, enter 4.00 in the Cutoff Value column for A+.

Note: The program uses the GPA Equivalent column to translate grades into grade point values for calculations, while it uses the range created by the Cutoff Value column to translate grade point values into the grades in the Grade Equivalent column.

Do not interpret the GPA Equivalent column and Cutoff Value columns as a range from left to right. The program uses the two columns separately. The program uses the GPA Equivalent column to translate grades into grade point values for calculations, while it uses the range created by the Cutoff Value column to translate grade point values into the grades in the Grade Equivalent column.

19. In the Use in GPA Calcs column, mark the checkbox for each grade to use in GPA calculations.

20. To save the translation table and return to the Translation Tables page, click Save and Close.
Making a translation table inactive

You cannot delete a translation table after it is associated with a marking column on a course record, but you can make a translation table inactive to prevent selecting it on new course records.

1. From the Configuration page, click Registrar Setup.

   **Note:** To view inactive translation tables in the grid, mark **Show inactive translation tables** below the grid.

2. From the list on the left, select Translation Tables.

3. To open a translation table, select the translation table in the grid and click **Open** above the grid. The translation table appears.

4. Mark **Inactive** beside the **Translation Table** field.

5. To save the translation table and return to the Translation Tables page, click **OK**.

Applying Weights on Translation Tables or Course Records for GPAs

You may want to weight grades in certain classes with a higher grade point value. You can assign weights for calculating GPAs either by defining the weights on translation tables in Registrar Setup in **Configuration** or on course records in **Records**.

Be careful when determining which method to use, because it is possible to apply the weighting twice if defined on both translation tables and course records.
**Weighting on Translation Tables**

You may want to use this method if a standard is applied to all courses of a particular type and you know the particular GPA numeric values of each grade value.

To weight on a translation table, add a value to the grade point for each passing grade awarded in the course. When you associate translation tables with marking columns in Grading information on course records, associate the Standard Translation Table with standard courses and the WeightedTranslation Table with weighted courses. So when you run GPA calculations, the program automatically weights the grades due to the translation table definitions.

**Note:** If you use a formula containing credit or weight, be sure you have defined those values for the academic year’s grading information on the course record.

You can select the formulas not including “Weight” in the **Sum of** field on the GPA calculation.

**Weighting on Translation Tables: Calculating both Unweighted and Weighted GPAs**

If you add weights on translation tables, you can still calculate both unweighted and weighted GPAs. To do so, you must define two GPA types in the **GPA** table, one for Weighted and one for Unweighted.

**Note:** If you include unweighted and weighted GPA types on a translation table, you must include the highest weighted value in the grade point range in the **Valid grade points from [ ] to [ ]** field on the translation table.

On the Standard Translation Table, complete the **GPA Equivalent** column for the Unweighted GPA type and then enter the same values for the Weighted GPA type. On the Weighted Translation Table, enter the standard values in the **GPA Equivalent** column for the Unweighted GPA type and enter the weighted values for the Weighted GPA type.

Then define two identical GPA calculations, except associate one with the Unweighted GPA Type and one with the Weighted GPA type.

**Weighting on Course Records**

**Note:** You define course records in **Records**. For more information about course records, see the **Records Guide for Registrar’s Office**.

You can select a weight on the course record if you add or multiply by a value to award higher grade points. You can use weights on course records for another purpose if needed. For example, to include total attempted credits in a GPA calculation, consider defining the weight of a course as the total attempted credits and including Weight in the GPA calculation formula.

**Weighting on Course Records: Calculating both Unweighted and Weighted GPAs**

If you add weights on course records, you can still calculate both unweighted and weighted GPAs. To do so, you must define two GPA types in the **GPA** table.

For example, define GPA types for In-house GPA and Transfer GPA. You define two GPA types because you weight certain courses for in-house GPAs, but must provide unweighted GPAs for transfer transcripts.
On the translation table, complete the **GPA Equivalent** column for both GPA types with the same unweighted values.

<table>
<thead>
<tr>
<th>Letter Grade</th>
<th>In-house Grade Point Value</th>
<th>Transfer Grade Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>B</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>C</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>D</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>F</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Open each advanced placement course record, select the GPA types and enter a weight of 1 for the In-house GPA type and a weight of 0 for the Transfer GPA type.

**Note:** If you use a formula containing credit or weight, be sure you have defined those values for the academic year’s grading information on the course record.

Then define two GPA calculations, one using the In-house GPA type and using a formula in the **Sum of** field that includes Weight, and one using the Transfer GPA type that uses a formula that does not include Weight.

Another way to achieve the same outcome is to define the calculation for the In-house GPA type as Mark + Weight, but define the calculation for the Transfer GPA type as Mark. In this way, you make sure that no weights are added to GPAs calculated for transfers, even if a weight is mistakenly entered on a course record for the Transfer GPA type.

### Scheduling Rules

On the Scheduling Rules page in Registrar Setup, you define relationships that courses can have when being scheduled. To use a scheduling rule, select the rule on the Rules tab of a course record in **Records**. For example, you can define a rule that corequisite courses must be taken in the same term, such as a science course and its lab.

When associating the rule with a course, you can mark that the rule should always be followed, should be tried but not followed if not possible, or ignored. Keep in mind that you can override these settings when generating schedules.

The program uses scheduling rules when entering course requests, when assigning meeting times, rooms, and teachers to classes, and optionally when enrolling students. You can edit a scheduling rule at any time, however, editing a scheduling rule does not affect any existing course requests, class schedules, or student schedules.

You cannot delete a scheduling rule that is selected on a course record, but you can remove the rule from the course record. You can also make a scheduling rule inactive so you can no longer select it on course records.

**Note:** You can define as many scheduling rules as you need, but we recommend you make each rule as restrictive as necessary to streamline your scheduling process.

We include the Corequisite scheduling rule by default. This scheduling rule requires that the courses must be taken in the same term.
Adding a scheduling rule

1. From the Configuration page, click Registrar Setup.
2. From the list on the left, select Scheduling Rules.
3. To add a new scheduling rule, click New Scheduling Rule on the action bar. The New Scheduling Rule screen appears.

4. In the Name field, enter a name for the new scheduling rule.
5. In the Term field, select “Same” or “Different” to designate whether classes must be scheduled in the same term or different terms.
6. If you mark Use rule when enrolling students, the program uses the rule when entering course requests and assigning students to classes using automatic scheduling.

**Note:** If you select “Same Sections”, the program uses the rule only if both sections of both courses have the same section number.

7. You define the parameters of the scheduling rule in the Using column and Options column. You can only select an option only once for the rule in the Options column. For more information about considerations for certain options, see “Considerations for Options” on page 51.
   - If you select “Same”, you can select “Block”, “Times of Day”, “Days”, “Teachers”, “Room”, or “Sections”.
   - If you select “Different”, you can select “Days”, “Teachers”, or “Times of day”, or “Block”.
• If you select “Before”, you can select “Meetings”.
• If you select “After”, you can select “Meetings”.
• If you select “Immediately before”, you can select “Meetings”.
• If you select “Immediately after”, you can select “Meetings”.
• If you select “Consecutive”, you can select “Meetings”.

Note: “Times of Day” refers to start and end times. “Days” refers to the days classes meet. If you want classes to meet on the same days and at the same time or on different days at different times, for example, you must define rules for both “Times of Day” and “Days”.

8. To save the scheduling rule and return to the Scheduling Rules page, click OK.

Making a scheduling rule inactive
You cannot delete a scheduling rule if it is selected on at least one course record. If you no longer need a scheduling rule, you can make it inactive. When setting up new course rules, you cannot select inactive scheduling rules.

1. From the Configuration page, click Registrar Setup.

Note: To view inactive scheduling rules in the grid, mark Show inactive scheduling rules below the grid.

2. From the list on the left, select Scheduling Rules.

3. To open a scheduling rule, select the rule in the grid and click Open above the grid. The scheduling rule appears.
4. Mark **Inactive** under the **Term** field.

5. To save the scheduling rule and return to the Scheduling Rules page, click **OK**.

**Considerations for Options**

There are a few considerations to remember when selecting certain options.

**Block.** For this option to work, courses must be restricted to the same pattern.

**Teachers.** For this option to work, courses must have the same teacher listed as a resource.

- Combining same times of day and same days or using same block on its own with same teacher creates conflicts.

**Rooms.** If you select the same times of day and same days or same block, courses must have the same room listed as a resource and the **Allow classes to meet concurrently** checkbox marked on the room record.

**Section.** For this option to work, section values for courses must be the same.

**Default Comments**

**Note:** We recommend you do not edit default comments while users are entering grade comments.

You can enter standard grade comments that users can select when entering grades. When you define default comments, you can format the font and alignment of the text. You can check spelling and check a thesaurus.

The order of comments in the list determines the order comments appear when accessing comments in **Grades**. You can place your most popular entries at the top to save time scrolling through less frequently-used comments. You can use the **Up** and **Down** buttons to rearrange the entries on the Default Comments page.

How users enter comments, in free-form text or by comment number, depends on your selection in the **Grade comments entry** field on the academic year record. For more information about academic years, see “Academic Years” on page 90.

- When entering free-form comments, users can enter text or select from a list of default comments.
- When entering comments by comment number, users can enter the numbers of default comments or select from a list of default comments.
Adding a default comment

1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Default Comments**.

   ![Registrar Setup Screen]

**Note:** You can add a new comment in a certain place in the list. Select the entry above which to insert the new comment and click **Insert** on the action bar.

3. To add a new comment, click **New Default Comment**. The New Default Comment screen appears.

   ![New Default Comment Screen]

4. In the **Comment Number** field, enter a number for the comment.

   **Note:** To add a time stamp to the note, press **F5**.
5. In the text box, you can enter and format comment text.

6. To save the comment and return to the Default Comments page, click **Save and Close**.

   - **Making a default comment inactive**
     
     You cannot edit or delete a comment that is associated with a grade. However, you can make a comment inactive so it cannot be associated with new grades.
     
     1. From the Configuration page, click **Registrar Setup**.
     
     2. From the list on the left, select **Default Comments**.
     
     3. In the **Inactive** column, you can mark the checkbox in a row to make the comment inactive.

   ![Comment Setup](image)

   **Note:** To view inactive comments in the grid, mark **Show inactive default comments**.

   4. The program automatically saves your changes when you leave the Default Comments page.

**Course Average Calculations**

Using course average calculations, you can define how to calculate marking column grades for courses based on other marking column grades. For example, if Semester 1 of Statistics is calculated using Midterm and Final Exam and Final Grade grades, you can define a calculation using Midterm and Final Exam and Final Grade and associate it with Semester 1 on Statistics’ course record.
When defining grading information on course records in *Records*, you can associate course average calculations. When running a calculation for a marking column in *Grades*, if the marking column is part of the calculation, the program excludes it. For example, if a calculation includes Midterm, Final Exam, Final Grade, and Semester 1, and you run the calculation for Semester 1, only Midterm and Final Exam and Final Grade grades are included.

- **Defining a course average calculation**
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Course Average Calculations**.
  3. To add a new calculation, click **New Course Average Calculation**. The New Course Average Calculation screen appears.

- **New Course Average Calculation**

- **Calculation name** field, enter a name for the course average calculation.
- **Description** field, enter a description of the calculation.

**Note:** When running the calculation for a marking column, the program uses values on the translation table associated with the marking column on the Grading tab of the course record.

- **Calculate using** field, select “Numeric grades” or “GPA equivalents” to determine what values to translate marking column grades to in the calculation.
• If you select “Numeric grades”, the program uses only numeric grades and translates any non-numeric grades to numeric equivalents according to the translation table.
• If you select “GPA equivalents”, the program translates numeric and letter grades to the GPA equivalent on the translation table for the selected GPA type. Select the GPA type in the GPA Type field.

7. In the Divide by field, select “Sum of the factors” or “Specific value” to determine the value to divide by when calculating the average.
   • If you select “Sum of the factors”, the factors of the marking columns are added together.
   • If you select “Specific value”, a field appears so you can enter a specific number to use.

8. In the Marking Columns to Include grid, select the marking columns to include in the calculation.
   • In the Marking Column column, select a marking column.
   • In the Factor column, enter a factor to weight the marking column grade in the calculation.

9. To set up a calculation to terminate if the program encounters certain grades, make selections in the Terminate Calculation grid. If the program encounters a grade you specify, the process terminates for the student but continues to the next student.
   • In the Value Encountered column, select a grade that will terminate a student’s calculation, for example, NG (No Grade) and Incomplete grades.
   • In the Result column, select the value to appear for a student with a terminated grade instead of an average. You can select the same value that you selected in Value Encountered.

10. In the Sample calculation field, the definition of the calculation appears for informational purposes only. For example, if you include Midterm and Final Exam and Final Grade each with a factor of one and select to divide by the sum of factors, “(Mid Term + Exam Grade + Final Grade) / 3” appears.

11. If both grade and numeric values are allowed for the course, in the Return result as field, select “Grade” or “Numeric value” to determine how the calculation displays the marking column grade.

**Note:** If you do not round results, results may be truncated.

12. To round results, mark Round result up at [ ] using a decimal precision of [ ]. In the first field, enter the number at which results are rounded. In the second field, enter the number of decimal places to use. An example appears to the right of the field based on what you enter. For example, if you round up at 5 using a decimal precision of 2, “89.005 is rounded to 89.01” appears.

13. To overwrite existing values with calculated values, mark Overwrite existing entries and set reason to. If you mark Overwrite existing entries and set reason to, you can enter a reason to include with the grade on the Grade Changes screen. For more information about the Grade Changes screen, see “Viewing Grade Changes” on page 12.

14. To save the course average calculation and return to the Course Average Calculations page, click **Save and Close**.

→ **Making a course average calculation inactive**

You can delete a course average calculation to remove the associated calculated course averages from records. If you mark the course average calculation as inactive, you do not delete existing calculated values on records but you can no longer run the calculation. Do not mark the calculation inactive if you still need it to calculate.

1. From the Configuration page, click **Registrar Setup**.

**Note:** To view inactive course average calculations, mark **Show inactive course average calculations**.
2. From the list on the left, select **Course Average Calculations**.

3. To open a calculation, select the calculation and click **Open** above the grid. The calculation record appears.

4. Mark **Inactive** beside the **Calculation name** field.

5. To save the calculation record and return to the Course Average Calculations page, click **Save and Close**.

**GPA Calculations**

You can define GPA calculations to calculate student GPAs for one marking column, the year to date, or cumulatively including more than one year. When you run a GPA calculation in **Grades**, GPAs are calculated based on the calculation’s definition.

Before defining GPA calculations:
- Confirm you have defined marking columns. You define marking columns in sets. For more information about marking column sets, see “Marking Column Sets” on page 37.

**Note:** You define GPA types in the **GPA** table in Tables in **Configuration**. Examples of GPA types are Weighted and Unweighted.
• Verify your translation table. When you define translation tables, in the GPA view, you define how grade and numeric values translate to GPAs. For each GPA type, designate the GPA equivalent of the numeric value, the range of grade point values that translate to the GPA, and whether it is used in GPA calculations. For more information about translation tables, see “Translation Tables” on page 39.

• If you plan to weight GPAs, for example, to reward students passing honors courses with an extra grade point, determine the method to use. For more information about weighting GPAs, see “Applying Weights on Translation Tables or Course Records for GPAs” on page 46.

• Verify GPAs associated with courses. You associate GPA types with courses when you set up grading information on course records. For more information about course records, see the Records Guide for Registrar’s Office. You can delete a GPA calculation at any time, but this deletes all associated calculated GPAs. You can make a GPA calculation inactive instead.

### Defining a GPA calculation

1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **GPA Calculations**.
3. To add a new calculation, click **New GPA Calculation**. The New GPA Calculation screen appears.
4. In the **Calculation name** field, enter a name for the GPA calculation.
5. In the **Description** field, enter a description of the calculation.
Note: After a calculation is run for a value, the checkbox of the value is disabled in Values allowed.

6. In Values allowed, mark the GPA values to calculate: GPA, Year-to-date GPA, and Cumulative GPA.
7. In the GPA Type field, select the GPA type to associate with the calculation.

Note: When running the calculation for a marking column, the program uses values on the translation table associated with the marking column on the Grading tab of the course record.

8. In the Calculate using field, select “Numeric grades” or “GPA equivalents” to determine what values to translate marking column grades to in the calculation.
   - If you select “Numeric grades”, the program uses only numeric grades and translates any non-numeric grades to numeric equivalents according to the translation table.
   - If you select “GPA equivalents”, the program translates numeric and letter grades to the GPA equivalent on the translation table for the selected GPA type.

9. In the Sum of field, select the formula to use when summing up marking column grades for the calculation. The selection you make depends on how you weight grades. For more information about weighting grades, see “Applying Weights on Translation Tables or Course Records for GPAs” on page 46.
   - “Mark” equals the marking column grade.
   - “Weight” is entered for the GPA type on the Grading tab of course records.
   - “Attempted Credit” equals the amount of attempted credits on grade records for the marking column.
   - “Earned Credit” equals the amount of credits the student is actually awarded in the marking column.

10. To determine what to divide the sum by, select “Number of grades”, “Sum of weights”, “Sum of attempted credits”, “Sum of earned credits”, or “Do not divide” in the Divide by field.

11. In the Terminate Calculation grid, you can set up the calculation to not return a result for a student if a certain grade value is encountered. Select the values in the grid, for example, NG (No Grade) and Incomplete grades. If the program encounters a selected grade value, the process terminates for the student but continues to the next student.

12. To designate a value to add to the calculation result, select “No value”, “Sum of weights”, or “ Specific value” in the Add to result field. If you select “Specific value”, a field appears for you to enter the value to use.

Note: If you do not round results, results may be truncated.

13. To round results, mark Round result up at [ ] using a decimal precision of [ ]. In the first field, enter the number at which results are rounded. In the second field, enter the number of decimal places to use. An example appears to the right of the field based on what you enter. For example, if you round up at 5 using a decimal precision of 2, “89.005 is rounded to 89.01” appears.

14. To translate the calculation results to the GPA equivalents, mark Translate results using and select the translation table to use.
   - If you select “Numeric grades” in Calculate using, the program translates the results to the GPA equivalents of the numeric values on the translation table’s GPA view. If these do not exist, it calculates the GPA equivalent based on the grade value.
   - If you select “GPA equivalents” in Calculate using, the program translates the results based on the GPA types’s cutoff values in the translation table.

15. To overwrite existing values with calculated values, mark Overwrite existing entries.

Note: When running a year-to-date calculation, only marking columns in the selected academic year and session are included.
16. If you marked Year-to-date GPA in Values allowed on the Formula tab, select the Year-to-Date tab.

17. To select a marking column to calculate, click Add Marking Column to Calculate. The Edit Criteria screen appears.

18. In the Marking column to calculate field, select the marking column to calculate.

19. In Include, mark All or Selected to designate the marking columns to include. If you mark Selected, use the right arrow to move the marking columns to include in the calculation from the Marking columns box to the Include these marking columns box.

Note: To run different calculations calculating the same marking column and sessions, you must define separate calculations.

20. In the Include these sessions box, mark the sessions to associate.
21. To save your selections and return to the Year-to-Date tab, click OK. Continue adding marking columns to calculate.

22. If you marked Cumulative GPA in Values allowed on the Formula tab, select the Cumulative tab.

23. In Include, mark All or Selected to designate the marking columns to include. If you mark Selected, use the right arrow to move the marking columns to include in the calculation from the Marking columns box to the Include these marking columns box.

24. In the Include these sessions box, mark the sessions to associate.
25. Select the Sample tab.

26. In the Show sample using field, select the marking column for which to view sample calculations calculated for that marking column.

27. A sample of each calculation you marked on the Formula tab appears in the box.

28. To save the GPA calculation and return to the GPA Calculations page, click Save and Close.

- Making a GPA calculation inactive

You can delete a GPA calculation at any time, which deletes any values calculated using the calculation. To leave the values but not use the calculation again, you can make the calculation inactive.

1. From the Configuration page, click Registrar Setup.

Note: To view inactive schools in the grid, mark Show inactive GPA calculations below the grid.

2. From the list on the left, select GPA Calculations.

3. To open a calculation, select the calculation and click Open above the grid. The calculation record appears.
4. Mark Inactive beside the Calculation name field.

![GPA Calculations interface](image)

5. To save the calculation record and return to the GPA Calculations page, click Save and Close.

**Performance Categories**

You can use performance categories to define overall levels of student performance for a marking column, such as Honor Roll, Athletic Eligibility, and Probation. Within a performance category, define levels, such as Dean’s List and President’s list and how students qualify for each level.

Rank the levels in a performance category from most exclusive to least exclusive. A student can receive only one level within a performance category. The program checks the levels from first to last and awards the student the first one the student meets. So if the category is for good performance, such as Honor Roll, rank the best level first. For example, if you have levels for President’s List (4.0 GPA) and Dean’s List (3.5 GPA or higher), be sure that President’s List is listed first so a student with a 4.0 GPA receives that level. If the category is for bad performance, such as Probation, rank the worst level first. For example, if you have levels for Probation (all grades in the F range) and Warning (all grades in the D to F range), be sure that Probation is listed first so a student with all F grades receives that level.

When defining a performance level, you can define criteria for GPAs or Grades, or a combination of the two.

- When setting criteria by GPAs, you select the GPA calculation and whether to include or exclude certain GPA values. The lowest and highest GPA values you enter are compared to the GPA values entered for the marking column for which you are running the performance.
- When setting criteria by grades, you select whether to include or exclude certain grades from one or all translation tables. For example, if the selected translation table includes grade values like A+, A, and A-, to exclude students with one instance of a letter grade lower than B-, you would select “Exclude” in Action, enter “1” in Count, select “Grade values” in Type, and enter “C+” in Highest Value and “F” in Lowest Value.

If you select criteria to include, students meeting all the Include criteria are included. If you select criteria to “Exclude”, a student meeting any of the Exclude criteria is excluded. We recommend you typically define at least one “Include” criterion, because if you define only “Exclude” criteria, any student not meeting the excluded criteria is awarded the level.

If you plan to set criteria by grades, we recommend you have grades marked Use in Performance on the applicable translation tables.
When you set up grading information on course records, you designate the performance categories to associate with the course.
Deleting a performance category deletes the category’s levels from associated students. Deleting a performance level from a category deletes the level from associated students.

- Adding a performance category
  1. From the Configuration page, click Registrar Setup.
  2. From the list on the left, select Performance Categories.
  4. In the Performance category field, enter a name for the category.
5. To add a performance level in the category, click **New Performance Level** on the action bar. The Edit Performance Level screen appears.

6. In the **Performance level** field, enter a name for the level.

7. In the **Short description** field, enter a description of the level to appear in **Grades**.

8. In the **Report comment** field, enter more information about the performance level to appear on report cards and transcripts for students qualifying for the level.

9. In the criteria grid, specify up to three criteria used to determine who qualifies for the level. You can select “GPAs” or “Grades” in the criteria columns and select “And” or “Or” in between. For each criterion you select, a tab appears below the grid.

10. If you are defining GPA criteria, select the **GPAs** tab.

11. In the **Action** column, select “Include” or “Exclude” to determine whether a student is included or excluded for the performance level based on the criteria you define in the row.

12. In the **GPA Calculation** column, select the GPA calculation to use.

13. In the **Value** column, select the value to use from the selected GPA calculation: “GPA”, “Year-to-date”, or “Cumulative”.

14. In the **Lowest Value** column, enter the lowest GPA to include or exclude.

15. In the **Highest Value** column, enter the highest GPA to include or exclude.
16. Continue adding the GPA criteria you need. When you are done, select the Grades tab if you are defining grade criteria.

17. In the Action column, select “Include” or “Exclude” to determine whether a student is included or excluded for the performance level based on the criteria you define in the row.

18. In the Count column, enter the number of grades a student must have to be included or excluded.

19. In the Type column, select the values to use from the translation table: “Numeric values” or “Grade values”.

Define grade criteria for a level using either type of value, but not both. When you run performance calculations, if the program encounters a grade using the other type, it translates the value appropriately using the translation table. (If you define two performance levels using both types, but that are equal, the first level a student meets will be assigned, and the second level will never be assigned.)

20. In the Using column, select a specific translation table to use or select “<All Translation Tables>”.

**Note:** If you select “<All Translation Tables>”, the highest value must be greater than or equal to the lowest value in all translation tables.

If you select “<All Translation Tables>” in Using and “Grade values” in Type, you can select only values that are present in all translation tables.

21. In the Lowest Value column, select the lowest value to include. If you selected “Numeric values” in Type, enter a number. If you selected “Grade values” in Type, select a grade from the translation table.

22. In the Highest Value column, select the highest value to include. If you selected “Numeric values” in Type, enter a number. If you selected “Grade values” in Type, select a grade from the translation table.

**Note:** To include or exclude one value, enter that value in both Lowest Value and Highest Value.

23. In the Marking Column column, you can select a marking column to base the criteria on a single marking column. If you leave this blank, the marking column you select when running the calculation is checked.

24. To save the performance level and return to the performance category, click Save and Close.

**Note:** In a category for good performance, rank the best level first. In a category for bad performance, rank the worst level first.

25. Continue adding the performance levels needed in the category. When you finish adding levels, make sure you arrange the performance levels in order on the grid from most exclusive to least exclusive. The program uses the order to determine the first level a student qualifies for in the grid to assign a level to the student.
Rank Interval Sets

Use rank intervals to designate how the program divides students into groups when ranking. For example, define a rank interval set with four intervals so you can rank students in quarters and a rank interval set with two intervals to rank students in halves.

When defining rank calculations, you can select the interval set to use. You cannot delete a rank interval set after it is associated with a rank calculation.

- **Adding a rank interval set**
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Rank Interval Sets**.

  ![Registrar Setup](image)

  3. To add a new set of rank intervals, click **New Rank Interval Set**. The New Rank Interval Set screen appears.

  ![New Rank Interval Set](image)

  4. In the **Description** field, enter a name for the rank interval.
  5. In the **Intervals** field, select the number of rank intervals. This determines the number of rows in the interval grid.
  6. In the **Description** column of the interval grid, enter a description of each interval, such as “Top Quartile”.
  7. If students do not divide equally among intervals, the program rounds the number down and spreads the remaining students evenly among intervals for which you check **Receives Remainder**. If you do not mark **Receives Remainder** for any intervals, the program adds the remainder to the last defined interval.
For example, if you have 30 students to fit in 4 intervals, the value for each rank is 7.5 but rounds down to 7. Mark one or more **Receives Remainder?** checkboxes so intervals receive the remaining two students.

8. To print the interval on report cards and transcripts, mark **Print**.

9. To save the rank intervals and return to the Rank Interval Sets page, click **Save and Close**.

**Rank Calculations**

Define rank calculations to determine how students qualify for a rank or percentile. You must first define GPA calculations and, if you are running ranks by intervals, define rank interval sets.

When you run a rank calculation in *Grades*, the program calculates ranks based on the calculation’s definition. If you delete a rank calculation, you delete the rankings from students for which the calculation has been run.

- **Defining a rank calculation**
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Rank Calculations**.
3. To add a new calculation, click **New Rank Calculation**. The New Rank Calculation screen appears.

4. In the **Calculation name** field, enter a name for the rank calculation.

5. In the **GPA calculation to use** field, select the GPA calculation to use to determine ranks. Students with the same GPA are assigned the same rank, but the next rank assigned is dependent on the number of students ranked higher. For example, if two students have the first rank, the next student still has the third rank.

6. In the **Value to use** field, select “GPA”, “Year-to-date”, or “Cumulative”.

7. In the **Rank method** field, select “Straight” or “Interval”. Straight ranks provide the student rank out of the total number of students. Interval ranks provide a straight rank plus a rank determined by the associated rank interval set.

8. If you select “Interval” as the rank method, in the **Interval to use** field, select the rank interval set to use.

9. To save the rank calculation and return to the Rank Calculations page, click **Save and Close**.

**Degree Audits**

You define the requirements for degrees, majors, minors, concentrations, and options in Registrar Setup in **Configuration**. On the Requirements tab of student records, you declare degrees, majors, minors, concentrations, and options for students. The requirements for the declared degree, major, minor, concentration, or option are then visible on the Requirements tab and you can review the progress a student is making on the requirements. You can also run the Requirements Audit Report to review students’ progress.
Using NetClassroom, parents and students can review progress on requirements. Using Faculty Access for the Web, advisors and administrators can review progress on requirements and also approve a student’s declarations. For more information about NetClassroom and Faculty Access for the Web, see the Administration Guide for NetClassroom and the Administration Guide for Faculty Access for the Web.

Degree Planning

Before defining your degrees, majors, minors, concentrations, and options in Registrar Setup in Configuration, we recommend you plan out what you will enter into the program. We recommend you use your course catalog or student handbook as a guideline for how you set up your requirements in the program.

List Degrees, Majors, Minors, Concentrations, and Options

List the degrees you offer, the majors and minors available within each degree, and any concentrations and options available within each major.

Determine Number of Credits for Each Degree

Determine the minimum number of credits needed to earn each degree. You will need this number so you know you are adding enough requirements for each degree.

List Requirements

List the core requirements for your degrees and the requirements for your majors, minors, concentrations, and options.

To determine your core requirements, we recommend you start by listing the requirements for all of your majors. To help determine which requirements will be major requirements versus which requirements will be core degree requirements, compare the requirements among your majors. Those requirements that are the same may be your core degree requirements. Degree requirements are the requirements that do not change depending on the major or minor declared within the degree. For example, if you require one freshman composition class and at least one advanced composition class for all majors within the Bachelor of Arts degree, you may make a Composition requirement a core requirement of the degree instead of a requirement within each major.

For each degree, major, minor, concentration, and option, we recommend you create a chart with headings for Type, Requirement, Credits Needed, Courses to Satisfy It, and Process Number. For this step, we are concerned only with the Requirement, Credits Needed, and Courses to Satisfy It columns.

Requirement Name. Requirement names are important so they are clear to the people reviewing student progress. When naming a requirement, it may just be the course name if the requirement consists of just that course. Or the requirement may have a more general name if it consists of more than one course. For example, if a requirement contains only the Freshman Composition course, you may just name the requirement “Freshman Composition”. But if the requirement contains various composition courses, you may give the requirement a general name such as “Advanced Composition”.

You may also spend time considering how you want to arrange courses into requirements. This depends on how you want the information to appear in the program and how restrictive you want to be with how requirements can be fulfilled. For example, you may define one Fine Arts requirement that needs nine credits, and can be satisfied with three various courses. Or you may define three separate Fine Arts requirements because you want to limit the courses available for each requirement (one requirement for dance, one for music, one for art).

Credits Needed. For most requirements, there will be a specific number of credits, but for some you may create a range of credits. For example, you may want to create a range in your General Elective requirement if you allow students to exempt out of other requirements but they need to be able to earn those credits within their General Electives instead.

Also, confirm that the minimum number of credits can be earned within each degree and major combination.

Courses to Satisfy It. When you specify courses to satisfy requirements in the program, you can either specify courses by selecting a department and/or course type of the courses to include, or by entering specific courses.
When determining which courses can satisfy a requirement, consider your school policies about how transfer courses are handled and policies about how not earning full credit is handled. For example, if transfer courses do not count as much as courses taken in-house, you need to make sure these transfer courses are included in the requirements so their credit can be received and you need to make sure that the student can complete the required credits with in-house courses.

Also, determine if you need to set up prerequisites to ensure courses are taken in the appropriate order. For more information about adding prerequisites, see the Courses chapter of the Records Guide for Registrar’s Office.

The following is an example of a chart for a Bachelor of Science degree:

<table>
<thead>
<tr>
<th>Requirement Name</th>
<th>Credits Needed</th>
<th>Courses to Satisfy It</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>6</td>
<td>ENG 101, ENG 102</td>
</tr>
<tr>
<td>Foreign Languages</td>
<td>6</td>
<td>Any courses in the Foreign Language department</td>
</tr>
<tr>
<td>Mathematics</td>
<td>6</td>
<td>MA 100, MA 111, MA 121, CPT 7877, MA 116</td>
</tr>
<tr>
<td>Computer Literacy</td>
<td>3</td>
<td>Any courses in the Computer Science department</td>
</tr>
<tr>
<td>Physical Education</td>
<td>6</td>
<td>PE 100, PE 101</td>
</tr>
<tr>
<td>Public Speaking</td>
<td>3</td>
<td>COM 101</td>
</tr>
<tr>
<td>Fine Arts</td>
<td>3</td>
<td>ART 101, ART 102, MUS 101, MUS 102, MUS 202, DNC 240</td>
</tr>
<tr>
<td>Humanities</td>
<td>3</td>
<td>PHIL 101, PHIL 102, THEO 101, THEO 102, THEO 201, THEO 202, PSY 101</td>
</tr>
<tr>
<td>Natural Sciences</td>
<td>9</td>
<td>Any courses in the Science department</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>3</td>
<td>PSY 100</td>
</tr>
<tr>
<td>Government/History</td>
<td>6</td>
<td>HIS 201, HIS 202, HIS 2334, HIS 2335, HIS 4459, HIS 4460, ECON 101, ECON 102, ECON 201, ECON 202</td>
</tr>
</tbody>
</table>
The following is an example of a chart for a Biology major:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Credits Needed</th>
<th>Courses to Satisfy It</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Biology</td>
<td>15</td>
<td>BIO 111, BIO 112, BIO 210, BIO 211, BIO 491</td>
</tr>
<tr>
<td>Advanced Biology</td>
<td>15</td>
<td>BIO 227, BIO 228, BIO 325, BIO 326, BIO 330</td>
</tr>
</tbody>
</table>

**Requirement Groups**

**Warning:** If you change existing requirements, you could potentially change a student’s status to incomplete. To not impact current students, consider whether to update existing requirements or to create new requirements.

Requirement groups enable you to give students flexibility in completing a requirement and also accommodate complex degree requirement combinations. The following are three different examples of how to use groups.

- Students complete the requirement when they complete a certain number of groups and meet the requirement’s overall credits required. For example, you have a specific fine arts requirement for Bachelor of Arts degrees. Students must take two courses from at least two different groups - art, music, theater, and dance. If you require a student take one course from every group, we recommend you instead create separate requirements for each group.

  If you decide to use groups this way, define all your groups, identify which courses are in each group through the Group column in the requirements grid, define the number of credits required for each group (same for all or specific to each group), and choose how many groups need to be completed for the requirement to be met.

- Students complete a requirement when they complete the credits required from each group defined and meet the total credit requirement. For example, you require students to take courses in language and literature courses to fulfill a requirement. Overall, they must complete 6 credits in three different groups. Group one is foreign language courses. Group two is creating writing, nonfiction writing, and poetry courses. Group three is classical and modern literature courses. Each course is three credits. To complete the requirement, the student needs to take two courses in each of the three groups.

  If you decide to use groups in this way, define all your groups, identify which courses are in each group through the Group column in the requirements grid, define the number of credits required for each group (same for all or specific to each group), and choose “the included groups are complete” in **The requirement is fulfilled when the total credits are met** field.

- Students complete a requirement when they take courses from one of the groups defined until the total credit requirement is fulfilled. For example, you require a foreign language in your Bachelor of Arts degree. To ensure students meet the requirement, you group courses based on language. Students choose a language and complete courses through second year in one language instead of taking one Spanish, one French, and one German course.

  If you decide to use groups this way, define all your groups, identify which courses are in each group through the Group column in the requirements grid, define the number of credits required for each group (same for all or specific to each group), and choose “the specified number of groups is complete” in **The requirement is fulfilled when the total credits are met** field and enter “1”.

We recommend before you update existing requirements or create new requirements with groups, to plan on paper what you need. When you are ready to create new groups you can define them on the Requirements Group table in *Configuration* or when you define the options for the requirement.

If you update existing requirements, you may also need to update substitutions to accommodate groups.
Determine Arrangement

After you have completed your charts, look over the requirements in each to determine how want to package requirements within each degree, major, minor, concentration, or options. You can define “types” to arrange requirements. We recommend you use your course catalog as a guideline for how you arrange your requirements.

Using the previous degree chart as an example, we categorize the requirements into types:

<table>
<thead>
<tr>
<th>Type</th>
<th>Requirement Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Competencies</td>
<td>English</td>
</tr>
<tr>
<td>Core Competencies</td>
<td>Foreign Languages</td>
</tr>
<tr>
<td>Core Competencies</td>
<td>Mathematics</td>
</tr>
<tr>
<td>Core Competencies</td>
<td>Computer Literacy</td>
</tr>
<tr>
<td>Core Competencies</td>
<td>Physical Education</td>
</tr>
<tr>
<td>Core Competencies</td>
<td>Public Speaking</td>
</tr>
<tr>
<td>Studies in the Disciplines</td>
<td>Fine Arts</td>
</tr>
<tr>
<td>Studies in the Disciplines</td>
<td>Humanities</td>
</tr>
<tr>
<td>Studies in the Disciplines</td>
<td>Natural Sciences</td>
</tr>
<tr>
<td>Studies in the Disciplines</td>
<td>Social Sciences</td>
</tr>
<tr>
<td>Studies in the Disciplines</td>
<td>Government/History</td>
</tr>
</tbody>
</table>

Using the previous major chart as an example, we categorize the requirements into types:

<table>
<thead>
<tr>
<th>Type</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Competencies</td>
<td>General Biology</td>
</tr>
<tr>
<td>Enrichment Requirements</td>
<td>Advanced Biology</td>
</tr>
</tbody>
</table>

Determine Processing Order

You should consider the order in which the program processes courses satisfying requirements. This is important when a course can fulfill more than one requirement.

Order of Degrees, Majors, Minors, Concentrations, and Options

The program first looks at the order in which degrees, majors, minors, concentrations, and options are processed. On each degree, major, minor, concentration, and option record, you enter a number in the **Process requirements as # [ ] compared to other declarations for the student** field. So, in your Bachelor of Arts degree, if you have a major in Religion with a concentration in Counseling, you may want to process the minor requirements, then the core degree requirements, then the major requirements. So you would enter “1” on the minor record, “2” on the degree record, and “3” on the major record. For majors in English without a concentration, you may want to process the core degree requirements first then the major requirements. So you would enter “1” in the degree records and “2” on the major record. However, because these majors are within the same degree, you need to review these again and decide on one number to assign the Bachelor of Arts degree record.
Order of Requirements Within Each Degree, Major, Minor, Concentration, and Option

Then, when processing requirements within each degree, major, minor, concentration, or option, the program first looks at the difference in the total number of credits available in the courses selected in the requirement and the total credits needed to meet the requirements. (If a credit range is entered for the credits needed, the lowest range is used.) The requirements with the lowest differences are processed first. Using the following example, 30 credits are available for the Mathematics requirement and 12 credits are available for the Computer Literacy requirement:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Credits Needed</th>
<th>Courses to Satisfy It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mathematics</td>
<td>6</td>
<td>MA 100, MA 111, MA 121, CPT 7877, MA 116 (worth 3 credits each)</td>
</tr>
<tr>
<td>Computer Literacy</td>
<td>3</td>
<td>CPT 100, CPT 7877, CPT 7878, CPT 7879 (worth 3 credits each)</td>
</tr>
</tbody>
</table>

The difference between the available credits and needed credits for the Mathematics requirement is 24, and the difference between the available credits and needed credits for the Computer Literacy requirement is 9. Because it has the lowest difference, the Computer Literacy requirement will be fulfilled first.

When requirements have the same difference, the process order you enter on the requirement record is used. You enter a number on each requirement record in the Process requirement as # [] compared to other requirements for this degree/major/minor/concentration/option field: enter “1” as the process order for the requirement to fulfill first, “2” for the requirement to fulfill second, etc. You can list the process number beside each requirement in the Process Number column on each of your charts.
Review Naming

Make sure the names of your degrees, majors, minors, concentrations, and options, your requirements, and your groupings will make sense to someone viewing this information.

Determine Valid Dates

Consider whether you will be reviewing requirements and creating new degree, major, minor, concentration, and option records for each academic year, or only modifying these records as needed. This affects how you use the valid date ranges on degree, major, minor, concentration, and options records. For example, for a major:

- If you review and edit requirements each academic year, you can enter the dates of the academic year as the valid dates for the major. By creating a copy of your requirements each year, your requirements are managed like a catalog.

**Warning:** To update requirements, be sure to change the dates instead of editing existing information. If you edit existing information, you may previously complete requirements incomplete.

- If you generate new requirements only as changes are needed, you only enter valid dates for the degree as needed. For example, for the 2005-2006 academic year, you do not require students majoring in Humanities to take courses in Quantitative Reasoning. Then on May 15, 2006, you decide to require two courses in Quantitative Reasoning. You do not want students who have already declared the major to be affected by this change, but want students who subsequently declare the major to have the new requirements. So in this case you would create two different Humanities major records, one with no start date with a finish date of May 15, 2006, and one with a start date of May 16, 2006 with no end date.

Create an Undecided Degree

You may want to create a degree named Undecided. This will allow you to query on students without majors declared. Or you can add general requirements to the Undecided degree so you can review students’ general progress before they declare their major.
Degrees

In Registrar Setup in Configuration, you define degrees and their requirements.

You declare degrees for students on student records. If you add or delete requirements, update the credits or courses of the requirements, or change the valid dates for the degree after it is assigned to a student, student requirements are recalculated.

Before adding degrees, we recommend you complete the section “Degree Planning” on page 69.

- Adding a degree
  1. From the Configuration page, click Registrar Setup.
  2. From the list on the left, select Degrees.
  3. To add a new degree, click New Degree. The New Degree screen appears.

Note: You can click the Name field label to access the Degrees table.

  4. In the Name field, select or enter the name of the degree. If you enter a new degree name, a message appears asking if you want to add it to the Degrees table. Examples of degree names include Associate’s, Bachelor of Science, and Master of Arts.

Warning: If editing a degree already selected on student records, make sure all student records are closed so the affected records can be updated.
5. In the **Description** field, you can enter additional information about the degree for reference.

6. In the **Degree type** field, select “Undergraduate”, “Graduate”, or, leave the field blank. Your selection is used on the 1098T form in **Student Billing** to determine which students should be marked as a graduate student.

7. In the **Valid from [ ] to [ ]** fields, enter the dates for which the degree is valid.

   You are not required to enter a date range for the degree. However, consider how entering date ranges can help you maintain separate sets of requirements when requirements change. The date a student declares a degree, as recorded on the student’s record, determines which requirements the student is subject to.

   - If you review and edit requirements each academic year, you can enter the dates of the academic year as the valid dates for the degree.
   - If you generate new requirements only as changes are needed, you can enter the applicable date ranges for each degree. For example, for the 2005-2006 academic year, you do not require students earning a Bachelor of Arts degree to take courses in Quantitative Reasoning. Then on May 15, 2006, you decide to require two courses in Quantitative Reasoning. You do not want students who have already declared the degree to be affected by this change, but want students who subsequently declare the degree to have the new requirements. So in this case you would create two different Bachelor of Arts degree record, one with no start date with a finish date of May 15, 2006, and one with a start date of May 16, 2006 with no end date.

   Date ranges for a degree cannot overlap. When entering a date range, if any associated majors or minors have a blank valid date field or fall outside of the date range, you will receive a message that the dates will be updated on the majors and minors.

   **Warning:** To update requirements, be sure to copy the existing record and change the dates instead of editing existing information. If you edit existing information, you may make previously complete requirements incomplete.

   When changing requirements, you can copy the existing degree record, change the dates, and update the requirements. For information about how to copy a record, see “Copying a degree” on page 79.

8. In the **Minimum number of credits needed** field, enter the minimum number of credits a student must earn to achieve the degree.

   To be counted toward the minimum number of credits need, a credit must satisfy a requirement.

   The number you enter should include the number of credits need for both core degree requirements and major requirements.

9. In the **Number earned at this institution** field, enter the minimum number of credits that must be taken at your school, not earned at other schools.

10. In the **Process requirements as # [ ] compared to other declarations for the student** field, enter a number to indicate the order in which the degree is processed by the program, compared to other declarations for a student, when determining which requirement a course should fulfill when a course can fulfill more than one requirement. For more information about determining your process order, see “Determine Processing Order” on page 72.

11. Under **Requirements**,
12. To add a requirement for the degree, click **New Requirement**. The New Degree requirement screen appears.

![New Requirement Screen](image)

13. In the **Type** field, select or enter the type of requirement. If you enter a new type, a message appears asking if you want to add it to the **Types** table. For example, enter “General Education”. For more information about grouping requirements, see “Determine Arrangement” on page 72.

14. In the **Requirement name** field, enter the name of the requirement. For example, enter “Quantitative Reasoning”.

15. In the **Completed using** field, select whether to use required credits or completed tasks to fulfill the requirement. Use required credits when a student must take and earn credits in a course. Use completed tasks when a student must take and complete a course. For example, students must complete a senior thesis. Students don’t earn credits towards the degree but they must complete a course in which they write the thesis before they can graduate.

   If you select Required credits, enter the credits required information in the next step.

   If you select Completed tasks, the **Credits required from [ ] to [ ]**, **General elective requirement**, **Number of credits to complete each group**, and **The requirement is fulfilled when the total credits are met** fields disable. If you select Courses in the **Specify using** field and select to complete the requirement with completed tasks, every course you enter in the **Courses** grid must be completed to fulfill the requirement.

   **Warning:** If you change existing requirements, you could potentially change a student’s status to incomplete. To not impact current students, consider whether to update existing requirements or to create new requirements.

16. In the **Credits required from [ ] to [ ]** fields, enter the number of credits required to complete the requirement. For most requirements, you will enter the same number in each field and not create a range. However, for example, you may want to create a range in your General Elective requirement if you use requirement groups or if you allow students to exempt out of other requirements but they need to be able to earn those credits within their General Electives.

17. To specify the degree requirement as a general elective, mark **General elective requirement**? When you exempt a requirement, you have to make up those exempted credits. Only requirements marked as general electives will be used when the system compares “Credits required from” and “Credits required to” and determines where to add the exempted credits.
18. In **Specify using**, you determine how you specify courses to meet the requirement. If you select “Department/Course Type”, you can select the department and/or type of the courses to include. If you select “courses”, you enter specific courses that can meet the requirement.

19. If you selected “Department/Course Type” in the **Specify using** field, the **that will default to satisfying** field appears. In this field indicate which requirements the course can meet. Select “All requirements”, “Only this requirement”, “This requirement and requirements outside this degree”, or “This requirement and requirements inside this degree”. The value selected in this field becomes the default value in the **Can Satisfy** column in the courses grid.

20. If you selected “Department/Course Type” in **Specify using**, the **Department** and **Course types** field are enabled. Any courses within the department and course type you select can meet the requirements. You can leave one of these fields blank.

21. When processing requirements within the degree, the number entered in **Process requirement as # [ ] compared to other requirements for this degree** determines which requirement is processed first. For more information, see “Determine Processing Order” on page 72.

22. To require a specific grade or higher to complete the requirement, select the **Require a minimum** checkbox, select to use a letter grade or numeric grade, and in the **of** field select the letter grade or enter the numeric grade. For example, you may require a B or higher letter grade or an 85 numeric grade in a student’s core courses.

**Warning:** In the **Completed using** field, if you selected Completed tasks, then all courses you enter in the grid must be completed to fulfill the requirement.

23. If you selected “Courses” in **Specify using**, the courses grid is enabled for you to enter the specific courses that can meet the requirement.
   - In the **Course ID** column, you can enter the course name or click the binoculars to search for the course.
   - To select a query of courses to load into the grid, click **Load Courses** above the grid. The last query you load appears as a **Load Using** button above the grid.

   The course name, department, and course type of each course appear for informational purposes only.

24. In the **Can Satisfy** column, the requirements for each course listed in the courses grid, are based on the value selected in the **that will default to satisfying** field. However, you can change the value. Select “All requirements”, “Only this requirement”, “This requirement and requirements outside this degree”, or “This requirement and requirements inside this degree”.

25. In the **Group** column, if a course is part of a group that needs to be completed for the requirement, select or enter the requirement group name. If you define a group for one row, all rows must have a group defined. For more information, see “Requirement Groups” on page 71.

26. If you use groups to determine if a requirement is satisfied, in **Number of credits to complete each group** select “same for all groups” or “specific to each group”.
   - If you selected “same for all groups” in the **Number of credits to complete each group** field, enter the number of credits each group is required to complete.
• If you selected “specific for each group” in the Number of credits to complete each group field, click Groups.

Tip: We recommend you use the Cannot Be Used With field if students need to complete one group to fulfill the requirement. For example, if a student takes a course in the Chinese language group, she cannot fulfill the requirement by taking courses in the Spanish, German, or French groups. Instead, she needs to meet the requirement with courses in the Chinese group.

On the Groups screen, for each group, select the Group, enter the Credits Required, and any groups that Cannot Be Used With.

Click OK and you return to the Requirements screen.

27. In The requirement is fulfilled when the total credits are met field, select “the included groups are complete” or “the specified number of groups is complete”.

If you select “the specified number of groups is complete”, enter the number of groups that need to be completed to meet the requirement. You cannot enter a number equal to the total number of groups defined in the requirements grid. If each group is required, you need to create separate requirements for each group. For more information about how to use this field, see “Requirement Groups” on page 71.

28. To save the requirement and return to the degree screen, click OK.

29. Use the Up and Down buttons to put the requirements in the order that they will appear on student records, on reports, and in Faculty Access for the Web and NetClassroom.

30. To save the degree and return to the Degrees page, click Save and Close.

Copying a degree

To save time when setting up similar degrees, you can copy one degree record, edit it, and then save it with a new name.

1. From the Configuration page, click Registrar Setup.

2. From the list on the left, select Degrees.
3. Select the degree in the grid and click **Copy from** on the action bar. The New Degree screen appears containing the same information as the selected degree record, except for the dates.

![New Degree Screen](image)

4. Enter new dates and make any other changes to the degree record.

5. To save the degree record and return to the Degrees page, click **Save and Close**.

- **Making a degree inactive**
  
  When you no longer want a degree available for students, you can make it inactive.

  1. From the Configuration page, click **Registrar Setup**.

     **Note:** To view inactive degrees in the grid, mark **Show inactive degrees** below the grid.

  2. From the list on the left, select **Degrees**.

  ![Registrar Setup](image)

  3. To open a degree record, select the degree in the grid and click **Open** on the action bar. The degree screen appears.
4. Mark **Inactive** beside the **Name** field.

5. To save the degree record and return to the Degrees page, click **Save and Close**.

**Majors/Minors**

On the Majors/Minors page, you can define the majors and minors associated with degrees and define concentrations and options within majors.

Above the list, in the **Degree** field, you can select a degree to show only the majors and minors associated with that degree in the list. In the **Type** field, you can select to just show majors, minors, concentrations, or options in the list.

- **Defining a major/minor**
  1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select Majors/Minors.

3. To add a new major/minor, click New Major/Minor. The New Major screen appears.

4. In the Type field, select “Major”, “Minor”, “Concentration”, or “Option”.

5. If you selected “Major” or “Minor” in the Type field, select the degree for which the major or minor applies in the For field. After you select a degree, the minimum number of credits needed for the degree appear beside the field for informational purposes.

If you selected “Concentration” or “Option” in the Type field, select the major for which the concentration or option applies in the For field.

Note: You can click the Name field label to access the Major/Minor or Concentration/Option table, depending on your selection in the Type field.
6. In the Name field, select or enter the name of the major, minor, concentration, or option. If you enter a new name, a message appears asking if you want to add it to the associated table.

7. In the Description field, you can enter additional information about the major/minor for reference.

8. In the Valid from [ ] to [ ] fields, enter the dates for which the major, minor, concentration, or option is valid.

**Warning:** If editing a major, minor, concentration, or option already selected on student records, make sure all student records are closed so the affected records can be updated.

You are not required to enter a date range for the major, minor, concentration, or option. However, consider how entering date ranges can help you maintain separate sets of requirements when requirements change. The date a student declares a major, minor, concentration, or option, as recorded on the student’s record, determines which requirements the student is subject to.

- If you review and edit requirements each academic year, you can enter the dates of the academic year as the valid dates for the major, minor, concentration, or option.
- If you generate new requirements only as changes are needed, you can enter the applicable date ranges for each major, minor, concentration, or option. For example, for the 2005-2006 academic year, you require students majoring in English to take a Religion course. Then on May 15, 2006, you decide to change the requirement to two Religion courses. You do not want students who have already declared the major to be affected by this change, but want students who subsequently declare the major to have the new requirements. So in this case you would create two different English majors, one with a start date with a finish date of May 15, 2006, and one with a start date of May 16, 2006 with no end date.

**Warning:** To update requirements, be sure to copy the existing record and change the dates instead of editing existing information. If you edit existing information, you may make previously complete requirements incomplete.

When changing requirements, you can copy the existing record, change the dates, and update the requirements. For information about how to copy a record, see “Copying a major/minor” on page 86.

9. In the Minimum GPA to fulfill requirements field, you can enter a minimum GPA a student must have to complete the major, minor, concentration, or option.

10. In the Process requirements as # [ ] compared to other declarations for the student field, enter a number to indicate the order in which the major, minor, concentration, or option is processed by the program, compared to other declarations for a student, when determining which requirement a course should fulfill when a course can fulfill more than one requirement. For more information about determining your process order, see “Determine Processing Order” on page 72.
11. To add a requirement, click **New Requirement**. The New Major requirement screen appears.

12. In the **Type** field, select or enter the type of requirement. If you enter a new type, a message appears asking if you want to add it to the **Types** table. For example, enter “Mathematics”. For more information about grouping requirements, see “Determine Arrangement” on page 72.

13. In the **Requirement name** field, enter the name of the requirement. For example, enter “Statistics”.

14. In the **Completed using** field, select whether to use required credits or completed tasks to fulfill the requirement. Use required credits when a student must take and earn credits in a course. Use completed tasks when a student must take and complete a course. For example, students must complete a senior thesis. Students don’t earn credits towards the degree but they must complete a course in which they write the thesis before they can graduate.

   If you select Required credits, enter the credits required information in the next step.

   If you select Completed tasks, the **Credits required from [ ] to [ ]**, General elective requirement, **Number of credits to complete each group**, and The requirement is fulfilled when the total credits are met fields disable. If you select Courses in the **Specify using** field and select to complete the requirement with completed tasks, every course you enter in the **Courses** grid must be completed to fulfill the requirement.

15. In the **Credits Needed From [ ] to [ ]** fields, enter the number of credits required to complete the requirement. For most requirements, you will enter the same number in each field and not create a range. However, for example, you may want to create a range in your General Elective requirement if you use requirement groups or if you allow students to exempt out of other requirements but they need to be able to earn those credits within their General Electives.

16. To specify the major, minor, concentration, or option requirement as a general elective, mark **General elective requirement?** When you exempt a requirement, you have to make up those exempted credits. Only requirements marked as general electives will be used when the system compares “Credits required from” and “Credits required to” and determines where to add the exempted credits.

17. In **Specify using**, you determine how you specify courses to meet the requirement. If you select “Department/Course Type”; you can select the department and/or type of the courses to include. If you select “courses”, you enter specific courses that can meet the requirement.

18. If you selected “Department/Course Type” in **Specify using**, the **Department** and **Course types** field are enabled. Any courses within the department and course type you select can meet the requirements. You can leave one of these fields blank.
19. When processing requirements within the degree, the number entered in Process requirement as # [ ] compared to other requirements for this degree determines which requirement is processed first. For more information, see “Determine Processing Order” on page 72.

20. To require a specific grade or higher to complete the requirement, select the Require a minimum checkbox, select to use a letter grade or numeric grade, and in the of field select the letter grade or enter the numeric grade. For example, you may require a B or higher letter grade or an 85 numeric grade in courses in the student’s major.

Warning: In the Completed using field, if you selected Completed tasks, then all courses you enter in the grid must be completed to fulfill the requirement.

21. If you selected “Courses” in Specify using, the courses grid is enabled for you to enter the specific courses that can meet the requirement.
   - In the Course ID column, you can enter the course name or click the binoculars to search for the course.
   - To select a query of courses to load into the grid, click Load Courses above the grid. The last query you load appears as a Load Using button above the grid.

The course name, department, and course type of each course appear for informational purposes only.

22. In the Can Satisfy column, for each course, indicate which requirements the course can meet. Select “All”, “Only this requirement”, “Only requirements outside this Degree”, or “Only requirements inside this Degree”.

23. In the Group column, if a course is part of a group that needs to be completed for the requirement, select or enter the requirement group name. If you define a group for one row, all rows must have a group defined. For more information, see “Requirement Groups” on page 71.

24. If you use groups to determine if a requirement is satisfied, in Number of credits to complete each group select “same for all groups” or “specific to each group”.
   - If you selected “same for all groups” in the Number of credits to complete each group field, enter the number of credits each group is required to complete.
   - If you selected “specific for each group” in the Number of credits to complete each group field, click Groups.

![Groups](image)

Tip: We recommend you use the Cannot Be Used With field if students need to complete one group to fulfill the requirement.

On the Groups screen, for each group, select the Group, enter the Credits Required, and any groups that Cannot Be Used With.

Click OK and you return to the Requirements screen.

25. In The requirement is fulfilled when the total credits are met field, select “the included groups are complete” or “the specified number of groups is complete”.


If you select “the specified number of groups is complete”, enter the number of groups that need to be completed to meet the requirement. You cannot enter a number equal to the total number of groups defined in the requirements grid. If each group is required, you need to create separate requirements for each group. For more information about how to use this field, see “Requirement Groups” on page 71.

26. To save the requirement and return to the major, minor, concentration, or option screen, click **OK**.
27. To save the major, minor, concentration, or options and return to the Majors/Minors page, click **Save and Close**.

- **Copying a major/minor**

To save time when setting up similar majors, minors, concentrations, and options, you can copy one major, minor, concentration, or option record, edit it, and then save it with a new name.

1. From the Configuration page, click **Registrar Setup**.
2. From the list on the left, select **Majors/Minors**.
3. Select the major, minor, concentration, or option in the grid and click **Copy from** on the action bar. The New Major/Minor screen appears containing the same information as the selected record, except for the dates.

![New Major/Minor screen](image)

4. Enter new dates and make any other changes to the record.
5. To save the record and return to the Majors/Minors page, click **Save and Close**.

- **Making a major/minor inactive**
  When you no longer want a major, minor, concentration, or option available for students, you can make it inactive.
  1. From the Configuration page, click **Registrar Setup**.

  **Note:** To view inactive majors/minors in the grid, mark **Show inactive majors/minors** below the grid.

  2. From the list on the left, select **Majors/Minors**.
3. To open a major/minor record, select the major/minor in the grid and click **Open** on the action bar. The major/minor screen appears.

4. Mark **Inactive** beside the **Name** field.

![Image of major/minor screen]

5. To save the major/minor record and return to the Majors/Minors page, click **Save and Close**.

6. In the **Completed using** field, select whether to use required credits or completed tasks to fulfill the requirement. Use required credits when a student must take and earn credits in a course. Use completed tasks when a student must take and complete a course. For example, students must complete a service project course in their senior year. Students don’t earn credits towards the diploma but the course is a requirement for all students before they graduate.
If you select Required credits, enter the credits required information in the next step.

If you select Completed tasks, the **Credits required from [ ] to [ ].** General elective requirement, **Number of credits to complete each group**, and **The requirement is fulfilled when the total credits are met** fields disable. If you select Courses in the **Specify using** field and select to complete the requirement with completed tasks, every course you enter in the **Courses** grid must be completed to fulfill the requirement.

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**Year Calculations**

Define year calculations to calculate a student’s year based on their number of credits. For example, you define a year of “Freshman” for students who have completed 0-24 credits.

The program determines the student’s year based on their credits earned when entering grades. Credit earned at other schools is also included.

If you edit the credit range of a year calculation, the program updates the years assigned to students.

If you no longer want a year to be assigned to students by the program, delete the year calculation. Even if the table entry associated with a year calculation is inactive, the year calculation can still be assigned to students.

- **Adding a year calculation**
  1. From the Configuration page, click **Registrar Setup**.
  2. From the list on the left, select **Year Calculations**.
3. To define a new calculation, click **New Year Calculation**. The New Year Calculation screen appears.

4. In **Year to calculate**, select the grade level to calculate. Grade levels are defined in **Tables Configuration**. You do not need to define a year calculation for every grade level table entry, particularly those grade levels that are used only in **Admission’s Office**. However, in **Registrar’s Office**, only those grade levels associated with a year calculation are included in year calculations for students.

5. In **Total credits from [ ] [ ]**, enter the range of credits for the year. This range determines the highest number of total credits the student must earn in order to achieve the grade level.

6. In **Year in school** field appears if you use PowerFAIDS. Select the year in school from the drop down menu. This information is required by PowerFAIDS and is used to determine a candidate’s financial aid qualification.

7. If you have the optional module **Degree Audits**, in the Degrees to include in calculation frame, you can mark the degree(s) the student must have in order to be assigned the particular grade level. For example, you may associate Freshman and Sophomore with a Bachelor’s of Arts degree while assigning First Year and Second Year to a Masters Of Divinity.

   If the student does not have a degree or does not fall into one of the ranges for a degree, the program will use the grade level selected for the When calculating a student's year, use [ ] for those students who cannot be calculated business rule.

   The order of the degrees on the student record is important. The program uses credits from courses that satisfy requirements in the first incomplete degree to determine year calculations. This includes majors, minors, concentrations, and options associated with that degree. Courses that fall under another degree or additional courses are not used to calculate the year. If a course satisfies multiple requirements, the course credits are only counted once. For more information about the order of degrees, see “Determine Processing Order” on page 72.

8. To save the year calculation record and return to the Year Calculations page, click **Save and Close**.

### Academic Years

**Note:** If you also have **Admissions Office**, academic year records are shared between **Admissions Office** and **Registrar’s Office**.
On the Academic Years page in Configuration, you can manage information about academic years for each school. By defining an academic year, you define an entire school year such as 2008-2009.

To schedule multiple schools at once, you must use the same Academic Year table entry and the same Session table entry across schools. The date ranges do not have to be the same for each school. We recommend you also use the same Term table entries, though this is not required.

Several elements comprise an academic year record.

**General Definition.** You name the academic year and enter the exact date range. You designate whether to enter and report attendance in the academic year by class and day or only by day. You also designate whether to allow grade comment entry by comment number or in free-form text during the year.

**Glossary:** Sessions are time frames with different schedules within an academic year, such as Fall, Winter, Spring, and Summer. Classes cannot span across sessions.

**Sessions.** You can define session records within an academic year for the time frames comprising the academic year, such as Fall, Winter, Spring, and Summer. Sessions are the largest time frames in which classes can meet. Classes cannot span across sessions.

When defining a session, you associate a marking column set, associate a timetable, mark the calendar days classes meet, and associate patterns. You can enter a date on which to start tracking schedule changes for students, which includes classes dropped, added, transferred, or withdrawn and changes in enrollment type. You can mark specific marking columns in the selected marking column set as view-only in grade entry.

**Note:** Do not confuse terms with marking columns. Marking columns are the time frames in which you enter grades and comments. You can associate multiple marking columns with a term, for example, associate Mid-Term and Final marking columns with one term.

You define terms within sessions. Terms are the smallest time frames in which classes can meet, and classes can span terms. You designate the first cycle day of each term and the program automatically assigns cycle days to dates. Decide whether to use sessions or terms as the time frames in which classes meet:

- **If you use sessions, classes cannot span across sessions.** For example, create separate sessions for Fall, Winter, Spring, and Summer and just add one term within each session using the same name as the session. If you also have **Student Billing**, how you bill students also affects how you use sessions and terms. Invoices include all the courses a student is taking for a particular academic year and session. If you bill separately for Fall and Spring, then you would create separate sessions for Fall and Spring.

- **If you use terms, classes can span across terms.** For example, create one session that spans the entire academic year and define terms for Fall, Winter, Spring, and Summer within that session. If you also have **Student Billing**, how you bill students also affects how you use sessions and terms. Invoices include all the courses a student is taking for a particular academic year and session. If you bill Fall and Spring together, then you would create one session and separate terms for Fall and Spring.

On a session’s scheduling calendar, you can designate dates when classes do not meet, such as holidays. You can change the cycle day assigned to a specific date. This is useful, for example, if you assign the wrong first day of cycle to a term but you already started entering attendance. You can correct this by adjusting the cycle day of a date without attendance entered and the program resets subsequent cycle day assignments in the correct sequence.

**Calendar of Events.** You can view and add events in the academic year from the Calendar of Events tab and view the school calendar. For more information about events and the school calendar, see “Events” on page 101.

You can change the timetable associated with a session if no courses are restricted by patterns associated with the timetable. For example, to change the period times on a timetable, you can create and select a new timetable for the session using the same cycle days without **Allow class meetings to occur only using periods** marked if class meetings already exist.
Adding an academic year

1. From the Configuration page, click Academic Years. The Academic Years page appears.

![Academic Years screen](image)

2. On the action bar, click New Academic Year. The New Academic Year screen appears.

![New Academic Year screen](image)

3. In the School field, select the school to associate with the year. The School field appears only if you have more than one active school.

Note: You can click the Academic Year field label to access the Academic Year table.

4. In the Academic year field, select or enter a short description for the academic year. If you enter a new academic year description, a message appears asking if you want to add it to the Academic Year table.

5. In the Description field, enter a longer description of the academic year for reference.

Warning: The date range of one academic year cannot overlap another academic year defined for the school. An academic year cannot exceed 12 months.

6. In the Start Date field, enter the first day of the academic year. In the End Date field, enter the last day of the academic year.

7. In the Track attendance by field, select how to track attendance for the year:
   - If you select “Class or Day”, you enter and report on both class and full day attendance in the academic year.
   - If you select “Day only”, you enter and report on half day and full day attendance in the academic year.

For information about how this setting affects how you define attendance codes and how the program calculates attendance, see “Attendance Codes” on page 149.
8. In the **Grade comments entry** field, select “Freeform” or “Numeric”. If you select “Freeform”, users can enter free-form text. If you select “Numeric”, users enter default comments by comment number. You define comments in Registrar Setup. For more information about default comments, see “Default Comments” on page 51.

9. If you selected “Freeform” in the **Grade comments entry** field, you can set the length allowed for a comment. Mark **Limit comment length to [ ] characters** and enter the number of characters. The default is 7,700.

10. Select the Calendar Events tab.

11. You can add and edit events from the Calendar Events tab. For more information about events, see “Events” on page 101.

12. To save the record and return to the Academic Years page, click **Save and Close**. Or, to define sessions of the academic year, continue with the next procedure.
Adding a session

Sessions are time frames with different schedules within an academic year, such as Fall, Winter, Spring, and Summer.

1. On the academic year record, select the General tab. The sessions grid is at the bottom of the screen.

2. To add a new session, click New Session on the action bar. The New Session screen appears.

3. In the Session field, select or enter a name for the session. If you enter a new session name, a message appears asking if you want to add it to the Session table.

4. In the Marking columns field, select the marking column set to associate with the session.
   To add a new marking column set, leave the field blank and click the magnifying glass. To view details of a marking column set, select the marking column set and click the magnifying glass.

5. In the Timetable field, select the timetable to associate with the session. The timetable determines the cycle days of the session.
To add a new timetable, leave the field blank and click the magnifying glass. To view details of a timetable, select the timetable and click the magnifying glass.

6. To keep a record of classes dropped, added, transferred, or withdrawn and changes in enrollment type for students, mark Track schedule changes beginning on and enter the date to begin tracking this information. The date can be the current date or later, and can be before the beginning of the academic year but not after the end of the academic year. For example, you may not want to track changes until the first day of classes when the drop/add period begins.

We recommend you establish communication with the schedulers who need to know when changes are being tracked. If multiple users are scheduling for the same school, academic year, and session, be sure that all of these users are aware if you change this setting. Be aware that if you turn this setting on and off, the change records may not match student schedules.

If you later change this date or unmark the checkbox, the changes already recorded are not deleted.

**Note:** You cannot edit the Days in session grid after classes are created.

7. In the Financial aid integration ID field, enter the POE ID used in PowerFAIDS with the same date range. PowerFAIDS uses this ID and session to know which period of enrollment to update. To export financial data PowerFAIDS, you must enter an ID.

Please note, you must have the same Financial aid integration ID for sessions that are for the same date range in multiple schools. For example, if Pepperworth College’s Fall 07 session has an integration ID of 4077, Pepperworth Seminary must also have an integration ID of 4077 for the Fall 07 session. This ensures the number of credits included in the export are calculated properly for students enrolled in classes in multiple schools.

8. In the Days in session grid, mark the days of the calendar week that classes can meet.

9. In the Available patterns box, mark checkboxes for the patterns to associate with the session. This controls the patterns that are available to associate with courses for the session.

10. In the Set these marking columns as view-only in grades box, you can mark checkboxes to make marking columns uneditable in Grades.
11. Select the Terms tab.

Note: We recommend you do not overlap terms because this can cause scheduling errors.

12. In the Term column, select or enter the name of the term. If you enter a new term, a message appears asking if you want to add it to the Term table.

13. In the Start Date column, enter the first date of the term.

14. In the Withdrawal Date column, enter the last date of the term that a student can drop a course. Report cards and transcripts do not list dropped courses. Report cards and transcripts list withdrawn courses.

15. In the End Waitlist On column, enter the date when processing for waitlists in that session will stop. This date determines the date students can no longer sign up for waitlists in NetClassroom.

Note: You cannot edit the start date or first day of cycle of a term after attendance exists in the term.

16. In the End Date column, enter the last date of the term.

17. In the First Day of Cycle column, select the cycle day to start with to initially assign cycle days to dates in each term.

   It is important to select the correct first day of cycle, because you cannot change the cycle day assigned to a date after attendance is entered on that date.

18. Make sure you arrange the terms chronologically in the grid. You can use the Up and Down buttons to rearrange the terms. Chronological order is important when scheduling classes in terms, especially multi-term courses.

Note: You can add scheduling calendar entries only within the dates of the terms of the session.
19. Select the Scheduling Calendar tab.

![Scheduling Calendar Table]

**Note:** Only one scheduling calendar entry can exist for one date per term.

20. To filter the scheduling calendar entries by term, you can select one term or all terms in the **Terms** field. To filter the scheduling calendar entries by date, “<All Dates>”, “Before Today”, or “On or After Today” in the **Show** field.

21. In the Date column, enter the date that is the exception. The term the date occurs in appears in the **Terms** column.

**Note:** You cannot change **In Session** if attendance exists for the date. Be sure to define emergency dates, like snow days, as not in session before attendance exists.

22. If classes can occur on the date, mark the checkbox in the **In Session** column.
   
   If classes should not meet on the date, unmark the checkbox.

23. If you do not mark **In Session**, the **Skip?** column is enabled. Because you are marking the date as not in session, designate how to calculate the next cycle day in session. For example, you have A, B, C, D, and E days and set up scheduling calendar entries on A and B days.

**Note:** You cannot skip a cycle day if attendance exists after the date.

- If you mark **Skip?**, the next date school is in session starts with cycle day of the date you skip. In this case, the program resets the next date to an A day and updates the sequence.

**Warning:** When skipping a cycle day for one school but not another, you can create potential class schedule conflicts with students, teachers, and rooms that were not originally found when scheduling.

- If you do not mark **Skip?**, the next date in session stays the same, in this case, a C day.

24. If you mark **In Session**, the **Cycle Day** column is enabled. In the **Cycle Day** column, enter the cycle day for the date. This resets the sequence of subsequent dates in the scheduling calendar. For example, you may want three A days in a row.

25. In the **Notes** column, enter an explanation for the entry.

26. To save the session and return to the academic year record, click **OK**.
Copying an academic year

Note: Before copying an academic year, you must define the description of the academic year to which you are copying information. You define academic year descriptions in the Academic Year table in Configuration.

To save time when setting up similar academic year records, you can copy one academic year record to another academic year.

1. From the Configuration page, click Academic Years. The Academic Years page appears.

2. Select the academic year to copy and click Copy from on the action bar. The Copy Academic Year screen appears.

3. In the School to copy to field, select the school to which to copy the academic year.

4. In the Academic year to copy to field, select the academic year to which to copy the academic year.

5. In the Start date and End date fields, by default, the program copies the month and day from the original academic year and then adds a calendar year. You can edit these dates.
The sessions and terms of the academic year appear in a grid.

6. In the **Start Date**, **End Date**, and **First Day of Cycle** columns of the grid, enter the dates and first cycle days of each term.

7. In the **Copy this information** box, mark the information to copy.
   - If you mark **Course grades information**, the program copies the Grades tab of grading information on course records for the academic year to the same course records for the new academic year. Information does not copy to courses marked as no longer offered.
   - If you mark **Course restrictions**, the program copies the restrictions on course records for the academic year to the same course records for the new academic year. Information does not copy to courses marked as no longer offered.
   - If you mark **Faculty/staff restrictions**, the program copies the restrictions on faculty/staff records for the academic year to the same course records for the new academic year. Information copies only to teachers marked as current teachers.
   - If you mark **Room restrictions**, the program copies the restrictions on room records for the academic year to the same room records for the new academic year. Information does not copy to rooms marked as inactive.
   - If you mark **Course billing**, the program copies information from the Billing tab of course records. The registrar’s office should coordinate with the billing office about this option since the billing office uses this information.

8. To begin copying, click **Copy Now**.

**Note:** Information on the academic year’s Calendar Events tab or the session’s Scheduling Calendar tab does not copy. View-only marking column selections and the setting for tracking schedule changes on sessions do not copy.

9. The new academic year record appears. Review and edit the academic year record as necessary.

10. To save the academic year record and return to the Academic Years page, click **Save and Close**.
Copying a session

To save time when setting up similar session records, you can copy sessions. The program automatically copies marking column association, timetable association, days in session, and pattern association. You designate whether the program should copy term information.

1. On the academic year record, select the General tab. The sessions grid is at the bottom of the screen.

2. To select a session to copy, click Copy from on the action bar. The Copy Session screen appears.

3. In the School field, select the school with the session to copy.
4. In the Academic Year field, select the academic year with the session to copy.
5. In the Session field, select the session to copy.

**Note:** The program does not copy the dates of the terms or the setting for tracking schedule changes.

6. To copy the Terms tab, mark **Include terms**.
7. To copy, click **OK**.
8. The new session record appears. Review and edit the session record as necessary, such as entering dates for the terms and specifying whether to track changes.
9. To save the session and return to the academic year record, click **Save and Close**.
Events

**Note:** If you also have *Admissions Office*, events are shared between *Admissions Office* and *Registrar’s Office*.

On the Events page in *Configuration*, you can set up records for events, such as sporting events, graduations, and holidays.

There are several ways to access the School Calendar from which you can view events and add new events.

**Event Records**

You can define both one-time and recurring events. You can make an event specific to one or more schools.

In *Registrar’s Office*, if you add an event during the term of a session of an academic year, you can automatically add scheduling calendar entries to the session for the dates of the event. The program refers to scheduling calendar entries on session records for whether the date is in session for the school and whether the cycle day should skip.

**Warning:** Only one scheduling calendar entry can exist for one date.

If you edit the dates of an event associated with scheduling calendar entries, a message appears asking if you want to update the scheduling calendar entries.

If you delete a scheduling calendar entry created from an event, the program does not delete the event record. However, if you delete an event associated with scheduling calendar entries, a message appears asking if you want to delete the scheduling calendar entries.

- Adding an event from the Events page
  1. From the Configuration page, click *Events*. The Events page appears.
2. On the action bar, click **New Event**. The New Event screen appears.

3. In the **Event ID** field, enter the name of the event.

4. In the **Description** field, enter a description of the event.

5. If your organization has more than one active school record, the **School** box appears. In the **School** box, mark the schools to associate with the event.

**Note:** Events can occur at any time and do not need to occur within an academic year.

6. In the **Start Date** field, enter the date the event begins.

7. In the **End Date** field, enter the date the event ends.

8. In the **Start Time** field, enter the time the event begins. In the **End Time** field, enter the time the event ends.
   
   Or, for an all-day event, leave the **Start time** and **End time** fields blank.

**Note:** You can click the **Category** field label to access the table.

9. In the **Category** field, select or enter a category for the event. If you enter a category, a message appears asking if you want to add it to the **Event category** table.

10. In the **Location** field, select a room. To search for a room, click the binoculars to access the Open screen. From the Open screen, you can select or add a room record.

**Note:** You can create room records for an event location, such as a soccer field, and designate that the room is not available for scheduling.

11. In the **Comments** field, enter comments about the event.

12. To save the event record, click **Save**. If the event’s dates are within the terms of a session of an academic year, a message appears asking if you want to create scheduling calendar entries for the dates of the event for the selected schools.
13. To create scheduling calendar entries, click Yes. The Generate Scheduling Calendar Entries screen appears.

![Generate Scheduling Calendar Entries]

14. To skip cycle days for the event's scheduling calendar entries, mark Skip cycle day. If you skip a cycle day, the next date school is in session starts with the cycle day of the first date you skip. For example, you have A, B, C, D, and E days and set up an event on A and B days. If you skip cycle days for this event, the program resets the next date to an A day and updates the sequence. If you do not skip cycle days for this event, the next date stays a C day.

15. If you are editing an event's dates and scheduling calendar entries already exist for any of the event's dates, and you are changing whether the cycle day is skipped, mark Overwrite existing entries to update the existing scheduling calendar entries with the same Skip? value.

**Note:** By default, the program marks event dates on the scheduling calendar as not in session. You can edit entries on the Scheduling Calendar tab of the session record.

16. To create the entries and return to the event record, click OK.

17. To save the event record and return to the Events page, click Save and Close.

- **Adding a recurrence to an event**

  You can set up an event to recur at specific intervals. For example, you can create a recurring event for a monthly faculty meeting.

  1. From the Configuration page, click Events. The Events page appears.
2. In the events grid, select the event for which to add a recurrence and click **Open** on the action bar. The event record appears.

3. On the toolbar, click the **Recurrence** button. The Recurrence screen appears.

4. In the **Event Time** frame, enter the time range of the event in the **Start time** and **End time** fields. Or, for an all-day event, leave the **Start time** and **End time** fields blank.

5. In the **Duration** field, enter the number of days the event spans. Enter duration in calendar days.

6. In the **Recurrence Pattern** frame, in the **Frequency** field, select “Annually”, “Monthly”, “Semi-monthly”, “Weekly”, or “Daily”.

7. Fields appear based on the frequency you select.
   - If you select “Annually”, select a specific date or day of the week. For example, you can set the pattern to February 15 or to the second Tuesday of February.
   - If you select “Monthly”, enter the month interval and a specific date or day of the week. For example, you can set the pattern to every 2 months on day 15 or every 2 months on the second Wednesday.
• If you select “Semi-monthly”, enter the month interval and two specific dates in a month.
• If you select “Weekly”, enter the week interval and the days of the week.
• If you select “Daily”, enter the day interval.

8. In the **Range of Recurrence** frame, enter the start date for the recurrence in the **Start date** field.
9. In the ending field, select “End by”, “End after”, or “No end date”.
   • If you select “End by”, a field appears so you can enter an ending date. The program can create recurring events up until the date you enter.
   • If you select “End after”, a field appears so you can enter the number of occurrences of the event.

**Note:** Scheduling calendar entries are created only within defined terms of sessions of academic years.

10. In the **Generate Scheduling Calendar Entries** frame, in the **When creating a new instance of the events** field, select how the event should affect the scheduling calendar:
   • If the event should not affect the scheduling calendar, select “Do not generate entries”.
   • If the date or dates of the event should be marked as not in session on the scheduling calendar, select “Generate entries to mark school not in session”.

**Note:** If you skip a cycle day, the next date school is in session starts with the cycle day of the first date you skip. For example, you have A, B, C, D, and E days and set up an event on A and B days. If you skip cycle days for this event, the program resets the next date to an A day and updates the sequence. If you do not skip cycle days for this event, the next day stays a C day.

   • To mark the date or dates of the event as not in session and to skip the cycle day, select “Generate entries to mark school not in session and skip cycle day”.

11. To save the recurrence and return to the event record, click **OK**.
12. The **Recurrence** field appears on the event record, instead of the date and time range fields.

![Memorial Day](image)

**Note:** If you did not generate scheduling calendar entries for the event but later want the event’s dates to be on the scheduling calendar, you can enter the event’s dates directly on the scheduling calendar of the applicable sessions. For more information about sessions, see “Academic Years” on page 90.

13. To save the event record and return to the Events page, click **Save and Close**.
### Removing a recurrence from an event

You can remove a recurrence from an event record. This removes future occurrences of the events, not the events that have already occurred. If you remove a recurrence, any events that have previously occurred become separate event records in the list on the Events page, distinguished with numeric designations, such as Graduation-1, Graduation-2, and so on.

1. From the Configuration page, click **Events**. The Events page appears.

   ![Configuration page with Events selected](image1)

2. In the events grid, select the event for which to remove a recurrence and click **Open** on the action bar. The event record appears.

   ![Event record with recurrence settings](image2)

3. On the toolbar, click the **Recurrence** button. The Recurrence screen appears.
4. Click **Remove Recurrence**. The program removes the recurrence and you return to the event record.

5. To save the event record and return to the Events page, click **Save and Close**.

**Printing a list of events**

1. From the Configuration page, click **Events**. The Events page appears.

2. On the Events page, display only the events in the grid that you want to print in the list. You can make selections in the **School**, **Academic year**, and **Category** fields to filter the events appearing the grid.

3. Right-click the grid and select **Print**. The Print Grid Options screen appears.

4. You can set formatting options on the General tab, including adding a header and footer, selecting the paper orientation, whether to include row and column grid lines and grid color settings, whether to number pages, and whether to size columns to fit the printed page.
5. To view how the formatting appears, select the Sample Output tab.

6. When you are ready to print, click **Print**.

**School Calendar**

The School Calendar displays events, cycle days, days of the term, and days not in session. If you access the calendar from the shell, it is named the School Calendar. If you access the calendar from a record, it is named the Event Calendar.

**Accessing the School Calendar**

You can access the School Calendar in several ways. To open the calendar to the current date and view events in all schools, select **View, School Calendar** from the shell menu bar.
To open the calendar to the date of a specific event, open the calendar from the event’s record. Select Event, Calendar from the menu bar or click the Calendar button on the toolbar.

![Calendar screenshot]

To open the calendar to a specific school and academic year, open the calendar from an academic year record. Click the Calendar button on the toolbar.

![Calendar year screenshot]

**Parts of the School Calendar**

*Note:* The action bar appears only if you access the calendar from a record, not from the shell.
Five sections comprise the School Calendar.

1: Action Bar

The first section is an action bar, and appears only if you access the calendar from a record, not from the shell menu. The action bar contains **New Event, Open, Print Calendar, Scheduling Calendar,** and **Go to Today** buttons.

- To add a new event record, click **New Event.**
- To open an event record, select the event on the calendar and click **Open.**
- To print the school calendar currently appearing, click **Print Calendar.**
- If the date you select on the calendar is within an academic year, you can click **Scheduling Calendar** on the action bar to open the session record to the Scheduling Calendar tab. For more information about the scheduling calendar, see “Adding a session” on page 94.
- To go to the current date on calendar, click **Go to Today.**

2: Calendar Grid

The calendar grid is the focal point of the school calendar. In the calendar bar above the grid, you can select the schools and dates to appear on the grid.

Select the school to appear in the grid or select “<All Schools>”. This field appears only if your organization has multiple schools, if not, just the school name appears.
Select the month and year to appear, or use the scroll buttons to move between months of the year.

You can set color options for the school calendar, including the color of a cell containing an event. For more information about setting options, see the Options chapter of the Program Basics Guide.

3: Event List

In the third section, below the school calendar, you can view the month’s events in a list view with more details from the event record. You cannot edit these rows, but you can double-click a row to open the event record.

4: Previous and Next Miniature Calendars

The fourth section, at the top right, houses the Previous and Next miniature calendars. These two calendars display the month before and the month after the current month appearing on the school calendar. You can click a month to open the month in the calendar grid.

5: Filters

The fifth section, underneath the miniature calendars, contains filters for events, cycle days, days of the term, and days not in session. You can check or uncheck these filters to control what appears in the calendar grid.

Addressee/Salutations

**Note:** If you also have Admissions Office, addressee/salutation formats are shared between Admissions Office and Registrar’s Office.

On the Addressee/Salutations page in Configuration, you can define addressee and salutation formats. An addressee is how a name appears on labels, cards, envelopes, letters, reports, report cards, and transcripts. A salutation is how you greet a person in letters and other mailings. For example, you can create a format for a couple’s nicknames such as “Bill and Meg” and a format with titles, first name, and last name such as “Mr. and Mrs. William Smith”. By configuring addressee and salutation formats, you help ensure that addressees and salutations appear consistently on mailings.

**Note:** We recommend that you do not use addressee/salutations with Social Security numbers for security reasons. If you do, users must have security rights to output the addressee/salutation on a form or report. If they do not have security rights, the Social Security numbers are masked. For more information, see the Security chapter of the Administration Guide for Blackbaud Student Information System.

In an addressee/salutation format, you include fields from records in the program, such as titles, names, social security number, and grade level. You can define custom fields to use in an addressee/salutation format.
Addresses/salutation formats can be edited at any time. However, you cannot delete a format if it appears on a record.

- **Adding an addressee/salutation format**
  1. From the Configuration page, click *Addressee/Salutations*. The Addressee/Salutation page appears.

  ![Configuration page with Addressee/Salutations section]

  2. To add a new addressee/salutation format, click *New Salutation* on the action bar. The New Salutation screen appears.

  ![New Salutation screen]

  3. In the *Field Name* field, select the specific field to include in the format. For example, if you want the person’s first name as part of the salutation, select “First name”.

  4. In the *Initial*, *Comma*, *Cond*, *Hard Brk*, *Concat*, and *Smart* columns, mark the formatting styles you want.
    - **Initial**: When you mark this checkbox, the program reduces the field entry to a single initial and inserts a period.
    - **Comma**: When you mark this checkbox, the program inserts a comma before the field entry.
    - **Cond (Conditional Break)**: When you mark this checkbox, the addressee/salutation wraps to the next line at the point where the conditional break is placed if the addressee/salutation is too long. For example, a salutation may not fit on certain sizes of address labels.
For example, for the format “Mr. William H. Smith and Mrs. Margaret A. Adams”, you can enter a conditional break for the spouse title so if “Mr. William H. Smith and Mrs. Margaret A. Adams” cannot fit on one line, the program breaks the format to have “Mr. William H. Smith and” on one line and “Mrs. Margaret A. Adams” on the next line.

- **Hard Brk** (Hard Break). When you mark this checkbox, the addressee/salutation automatically wraps to the next line at the point where the hard break is placed.

  For example, for the format “Mr. William H. Smith Mrs. Margaret A. Adams”, you can enter a hard break for the spouse title so “Mr. William H. Smith” appears on the first line and “Mrs. Margaret A. Adams” appears on the next line.

- **Concat** (Concatenate). When you mark this checkbox, the program removes the spaces between the current field and the subsequent field.

  For example, for the format “Mrs. Margaret Adams-Smith”, you can mark Concat for the spouse last name (Adams) and the hyphen.

- **Smart**. When you mark this checkbox, the program removes a user-defined field if the fields with the smart option are activated. For example, if you are working with an addressee/salutation format of “John and Jane Q. Smith” and you select the smart option by the spouse first name field, the program drops the “and” if there is not an entry in the spouse first name field. This prevents salutations of “John and Q. Smith”.

5. Verify the addressee/salutation appears correctly in the **Preview** pane.

6. To save the format and return to the Addressee/Salutations page, click **Save and Close**. The format appears on the Addressee/Salutations page.
Adding an addressee/salutation field

You can create your own addressee/salutation fields to use in addressee/salutation formats.

1. From the Configuration page, click **Addressee/Salutations**. The Addressee/Salutations page appears.

2. To add a new field to use in an addressee/salutation format, click **Add/Edit Field Values**. The Addressees/Salutation Fields screen appears.

3. In the **Field Names** column, enter the additional fields you want to appear in the **Field Name** column of an addressee/salutation format. Examples include “&”, “and”, “c/o”, and “To the parents of”.

4. To save the fields and return to the Addressees/Salutations page, click **OK**.

Attributes

**Note:** If you also have **Admissions Office**, attributes are shared between **Admissions Office** and **Registrar’s Office**.

On the Attributes page in **Configuration**, you can define attributes for specialized information you want to track but for which no field exists. For example, you can create a Library card number attribute for student records, a CPR Certification attribute for faculty/staff records, and an Annual Tuition attribute for organization records. By assigning attributes to records, you have another way to group information for reporting purposes.
**Glossary:** An attribute is a reporting tool used to group information based on a common theme. With attributes defined, you can filter information to your specifications.

You define attributes per record type and designate how the value of the attribute is entered on records, including text, date, yes/no, number, currency, or table. When you create attribute tables, you can enter table entries from the Tables page of Configuration or directly from the Attributes tab of a record. You can require an attribute value on a record. You can designate that an attribute can be entered only once on a record.

The order you set in the attributes grid determines the order attributes appear on a record. You can place your most popular attributes at the top to save time scrolling through less used attributes during data entry. You can use the Up and Down buttons to rearrange the attributes on the Attributes page.

You can rename an attribute type, change the required setting, or change the unique setting at any time and the program updates the attribute on associated records. You cannot change the data type of an attribute after it exists on a record. To delete an attribute in Configuration, you must first delete it from all records.

From the Attributes page, you can print the attribute grid details for all record types in the current program. From the menu bar on the Attributes page, select File, Print, then select Attributes Report.

- **Adding an attribute**
  1. From the Configuration page, click Attributes. The Attributes page appears.
  2. In the list on the left, select the type of attribute to add. The attributes grid appears on the right.
  3. In the Attribute Type column, enter a description of the attribute.
  4. In the Data Type column, select “Text”, “Number”, “Date”, “Currency”, “Yes/No”, or “Table” as the format type for the field.

**Note:** You can enter attribute table entries on the Tables page of Configuration or on the Attributes tab of a record.

If you select “Table”, select an existing table name in the Table Name column or add a new table. To add a new table for the attribute, select “[Add New Table]”.

5. To make the attribute required on each record, mark Required?. This prevents saving a record without a value for the attribute.
6. To make the attribute unique for each record, mark Unique?. This means you can use the attribute only once on a record.
7. When you exit the attributes grid, your changes are saved automatically.

**Letters**

**Note:** Applicant exports are available if you have Admissions Office.
You can generate letters quickly from records. For example, you can generate a letter of recommendation for a student. On the Letters page in Configuration, you can define letter descriptions and associate letters with Word merge files. You can associate action letters with applicant, faculty/staff, individual, organization, or student exports. You associate attendance, conduct, and student letters with student exports, faculty/staff letters with faculty/staff exports, financial aid letters with applicant or student exports, individual letters with individual exports, and organization letters with organization exports.

**Note:** On the File Locations tab in Options, you can specify a directory to store files created in Blackbaud Student Information System in a word processing format.

From the Letter menu on a student, faculty/staff, individual, or organization record, you can select a letter to use and also create a new letter format as you would here in Configuration. For more information about the Letter menu on records, see the Records Guide for Registrar’s Office.

You must add action, attendance, conduct, and financial aid letters through Configuration. You can select these letters on the corresponding tabs on records.

You can associate a letter with a simple or conditional Word merge file. For more information about simple and conditional Word merges, see the Export Guide for Blackbaud Student Information System.

You must have Word 2000 or Word XP installed on your computer to create Word merge files from Registrar’s Office.

- Adding a merge letter for a simple merge

  **Note:** If you also have Admissions Office, letters are shared between Admissions Office and Registrar’s Office.

  1. From the Configuration page, click Letters. The Letters page appears.

  2. From the treeview on the left, select the type of letter to create.


  4. In the Letter description field, enter a description for the letter. The letter description appears on the Letters page and when selecting letters on records.
Note: In the Export format field on the Open screen, select “Blackbaud Simple Word Merge”.

5. In the Blackbaud Word Merge export field, you can associate this letter with a Word merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

6. If the export file does not exist already, click Add a New Export on the Open screen. The Create a New Export screen appears.

7. In the What type of export do you want to create? box, select the type of export. The export types available depend upon the letter type.

Note: On the Export tab in Options, you can specify the export format that appears by default.

8. In the Export format field, select “Blackbaud Simple Word Merge”.
9. Click **Create Now**. The New Export screen appears for the type of export you are creating.

![New Export Screen](image)

**Note:** Any criteria you select for a field does not apply to the letter you are generating, keep in mind you are just selecting the merge fields to include on the letter.

10. To select the merge fields to include in the letter, select fields from the **Available Fields** treeview. In the treeview, click the plus sign to the left of a category to view the fields in that category. To move a field to the **Output** box, double-click the field or highlight it and click **Select**.

11. When you are done selecting fields, click **Edit word merge file**. **Word** opens automatically to a blank document to use to create your letter.

12. Type the letter in **Word**. To insert a field from **Blackbaud Student Information System**, select **Insert Blackbaud Student Information System field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

13. When you have finished creating the letter, click **Save and return to SIS to Merge**. You return to the New Export screen.

14. Click **Save and Close**. The Save Export As screen appears.

![Save Export As](image)

15. Enter a name and description of the export and click **Save**. You return to the New Letter screen.
16. To save and close the New Letter screen, click **OK**.

- **Adding a merge letter for a conditional merge**
  1. From the Configuration page, click **Letters**. The Letters page appears.

2. From the treeview on the left, select the type of letter to create.


4. In the **Letter description** field, enter a description for the letter. The letter description appears on the Letters page and when selecting letters on records.

**Note:** In the **Export format** field on the Open screen, select “Blackbaud Conditional Word Merge”.
5. In the Blackbaud Word Merge export field, you can associate this letter with a Word merge file. To search for an existing merge file, click the binoculars. The Open screen appears.

6. If the export file does not exist, you can click Add a New Export on the Open screen. The Create a New Export screen appears.

7. In the What type of export do you want to create? box, select the type of export. The export types available depend upon the letter type.

   Note: On the Export tab in Options, you can specify the export format that appears by default.

8. In the Export format field, select “Blackbaud Conditional Word Merge”.
9. Click **Create Now**. The New Export screen appears for the type of export you are creating.

![New Export Screen](image)

**Note:** Any criteria you select for a field does not apply to the letter you are generating, keep in mind you are just selecting the merge fields to include on the letter.

10. To select the merge fields to include in the letter, select fields from the **Available Fields** treeview. In the treview, click the plus sign to the left of a category to view the fields in that category. To move a field to the **Output** box, double-click the field or highlight it and click **Select**.
11. When you are done selecting fields, click **Conditional merge wizard**. The Blackbaud Conditional Word Merge Wizard screen appears.

![Blackbaud Conditional Word Merge Wizard](image1)

12. Select a field to use as a condition. Click **Next**.

![Blackbaud Conditional Word Merge Wizard](image2)

![Conditional Merge Document screen](image)

14. Based on the field you selected, select the condition and value for the letter. For example, if you are using Current status as the field, select “equal to” in the **Condition** field and “Withdrawn - May Reenroll” in the **this value** field.

15. Click **Edit merge document**. **Word** opens automatically to a blank document to use to create your letter.

16. Type the letter in **Word**. To insert a field from **Blackbaud Student Information System**, select **Insert Blackbaud Student Information System field** and select the field. This inserts a placeholder field that represents the value that will be merged into the document from a record.

17. When you have finished creating the letter, click **Save and return to SIS to Merge**. You return to the Conditional Merge Document screen.

18. In the **Document description** field, enter a description of the document.

19. Click **OK**.

20. To select more conditions, click **Back** and repeat steps 12-19.

21. When you are done selecting conditions, click **Finish**. You return to the New Export screen.

22. Click **Save and Close**. The Save Export As screen appears.

![Save Export As screen](image)

23. Enter a name and description of the export and click **Save**. You return to the New Letter screen.

24. To save and close the New Letter screen, click **OK**.

**International Addresses**

**Note:** If you also have **Admissions Office**, international addresses are shared between **Admissions Office** and **Registrar’s Office**.
On the International page in Configuration, you can format information for contacts in other countries and include specific address block formatting information. When adding a new address format, you must select one of the five supported formats on which to base your new address: United States, United Kingdom, Canada, Australia, or New Zealand.

We recommend you define the country records you need before entering addresses for the country. You cannot delete a country record after it exists on an address record.

- Adding a country
  1. From the Configuration page, click International. The International page appears.
  3. In the Name field, enter the name of the new country.
  4. In the Abbreviation field, enter an abbreviation for the country. This entry can be used in the address block.
  5. In Format address for this country like [ ] addresses, select a format for the address. For example, if you select “United States”, the address format for the new country defaults to the U.S. Postal Standard.
  6. To automatically mark the Synchronize with individual address fields checkbox on addresses created for the country, mark the By default, Synchronize individual address fields with <Address as it will be printed> checkbox. Marking the Synchronize with individual address fields checkbox prevents the address block from being edited and you can update the address block by editing the individual address fields.

To not automatically mark the Synchronize with individual address fields checkbox on addresses created for the country, do not mark the By default, Synchronize individual address fields with <Address as it will be printed> checkbox. Not marking the Synchronize with individual address fields checkbox means you must manually enter the address as you want it printed.

  7. To automatically include the country in the address block, mark Include country in <Address as it will be printed> using. Then, select “Country name” to include the entire name of the country or “Abbreviation” to include only the abbreviation.
You must mark **Synchronize with individual address fields** on the address record for the country to be automatically included in the address block.

8. To save the new country and return to the International page, click **Save and Close**.

## Business Rules

**Glossary**: A business rule is a system-wide preference. Use business rules to customize standard procedures and requirements that affect all users.

On the Business Rules page in **Configuration**, you set business rules that affect all users and customize standard procedures and requirements for your organization. Because some business rules can make fundamental changes to how **Registrar’s Office** works, we recommend the system administrator define business rules only after careful consideration.

### General Business Rules

**Note**: If you also have **Admissions Office**, business rules are shared between **Admissions Office** and **Registrar’s Office**.

With General business rules, you set rules for student IDs, the format of the years in **Class of** fields, whether to show marital status and maiden name fields for students, the statuses to include in grade and attendance entry, and the default font and font size of note text. If you have **NetClassroom**, you can set business rules for automatically generating user IDs and passwords for individual and faculty/staff records.

**Note**: If you also have **Admissions Office**, additional fields appear for applicant records.
Automatically generate student IDs starting with. Mark this checkbox so Registrar’s Office automatically generates new student ID numbers when you add students to the database. You designate the first number to use when creating student ID numbers. If you have Admissions Office, this business rule applies to applicant IDs.

Student IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new student ID numbers. If you have Admissions Office, this business rule applies to applicant IDs.

Prefix student ID with. You can enter a prefix of up to five characters to add to each new student ID.

Prevent data entry to the student ID field. Mark this checkbox to prevent the student ID field from being edited on records. This business rule prevents missing and duplicate IDs.

Display Marital Status and Maiden Name fields for Students. Mark this checkbox to include Marital Status and Maiden Name fields on student records. If you have Admissions Office, this business rule applies to applicant records.

Display class of using. Select whether to use the full-year format (“YYYY”) or only the last two digits of the year (“YY”) in Class of fields.

Include the following statuses when entering grades or attendance. Mark checkboxes for the statuses of students to include in grade and attendance entry. For example, you can exclude statuses of people who never attended your school or have graduated.

Generate Online user IDs and Passwords for individuals and faculty/staff with the included relationships with students. This business rule appears only if you have NetClassroom. By setting this business rule and selecting relationship types, the program automatically generates user IDs and passwords for individual and faculty/staff records when you add one of the selected relationship types to an individual or faculty/staff record.

To automatically generate user IDs and passwords for individual and faculty/staff records that already have the selected relationships, click Generate NetClassroom IDs in Administration. For more information about Administration, see the Administration Guide for Blackbaud Student Information System.

Generating user IDs and passwords does not affect individual or faculty/staff records that already have a user ID and password.

When generating User ID, use [ ] with the first [ ] characters of first/last name. This business rule appears only if you have NetClassroom. With this business rule, you can set a default format for automatically generated user IDs. Select “last name first name”, “first name last name”, or “random characters”. If you select “last name first name” or “first name last name”, select how many characters to use in the second field of the format.

When creating a new note, use. Select the default font and font size to use in note text. Changing the font and font size in this business rule does not affect existing notes.
Student Business Rules

With Student business rules, you set rules for student ages, status date updates, and duplicate student records. If you have *NetClassroom*, you can set business rules for automatically generating user IDs and passwords for student records.

Base student age on. Select how the program determines each student’s age based on birth dates. You can select System Date, Academic Year, or Specific Date.

- If you select System Date, the program calculates a precise age based on the current date.
- If you select Academic Year, the program calculates age based on the first date of an academic year. For example, you may use this setting for reporting on student ages for the next academic year.
- If you select Specific Date, the program calculates age based on a date you enter. For example, you may use this setting for checking student ages as of a certain date for cutoff requirements.

Update status date when updating current status. Mark this checkbox to automatically update the status date to the current date whenever you change the status on a student record.

When creating a new student, mark the student enrolled for [ ]. In this field, select the academic year in which to enroll a new student — the next academic year, the current academic year, or for no year.

Duplicate student criteria. In this grid, you can select specific student record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate student records.

Automatic check for duplicate students. With this business rule, the program automatically searches for duplicate student records based on duplicate student criteria when you save a new student record. In the corresponding field, you can require the program to either disallow duplicate students or warn the user if duplicate students are found.
Default current status for students created in Student Billing. If you also have Student Billing, this business rule appears so you can set the status to appear by default for students added through Student Billing.

When calculating a student's year, use [ ] for those students who cannot be calculated. For this business rule, select the grade level to use for students whose year cannot be calculated. For example, you can create a “No year assigned” entry for the Grade Level table for any student who does not fall into the normal range of credits for students. When marking students for reenrollment to create a student progression entry, if no year can be found based on total credits, your selection for this business rule is used.

Generate Online user IDs and Passwords for students. This business rule appears only if you have NetClassroom. By setting this business rule and selecting statuses and grade levels, the program automatically generates user IDs and passwords for student records created with a selected status and grade level or changed to have a selected status and grade level. The student record must meet both a status criterion and a grade level criterion. Status applies to current enrollments only.

To automatically generate user IDs and passwords for student records that already have a selected status and grade level, click Generate NetClassroom IDs in Administration. For more information about Administration, see the Administration Guide for Blackbaud Student Information System.

Generating user IDs and passwords does not affect student records that already have a user ID and password.

When generating User ID, use [ ] with the first [ ] characters of first/last name. This business rule appears only if you have NetClassroom. With this business rule, you can set a default format for automatically generated user IDs. Select “last name first name”, “first name last name”, or “random characters”. If you select “last name first name” or “first name last name”, select how many characters to use in the second field of the format.

Faculty/Staff Business Rules

With Faculty/Staff business rules, you set rules for faculty/staff IDs and duplicate records.

Automatically generate faculty/staff IDs starting with. Mark this checkbox so Registrar’s Office automatically generates new faculty/staff ID numbers when you add faculty/staff to the database. You designate the first number to use when creating faculty/staff ID numbers.
Faculty/Staff IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new faculty/staff ID numbers.

Prefix faculty/staff ID with. You can enter a prefix of up to five characters to add to each new faculty/staff ID.

Prevent data entry to the faculty/staff ID field. Mark this checkbox to prevent the faculty/staff ID field from being edited on records. This business rule prevents missing and duplicate IDs.

Duplicate faculty criteria. In this grid, you can select specific faculty/staff record fields to use as criteria when searching for faculty/staff duplicate records. The duplicate search is useful for preventing users from entering duplicate faculty/staff records.

In the Field Name column, you can select fields to use in the duplicate search. In the Length column, enter the number of characters to check in each field during the duplicate search.

Automatically check for duplicate faculty/staff. With this business rule, the program automatically searches for duplicate faculty/staff records based on duplicate faculty/staff criteria when you save a new faculty/staff record. In the corresponding field, you can require the program to either disallow duplicate faculty/staff members or warn the user if duplicate faculty/staff members are found.

Individual Business Rules

With Individual business rules, you set rules for individual IDs and duplicate records.

Automatically generate individual IDs starting with. Mark this checkbox so Registrar’s Office automatically generates new individual ID numbers when you add individuals to the database. You designate the first number to use when creating individual ID numbers.

Individual IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new individual ID numbers.

Prefix individual ID with. You can enter a prefix of up to five characters to add to each new individual ID.

Prevent data entry to the individual ID field. Mark this checkbox to prevent the individual ID field from being edited on records. This business rule prevents missing and duplicate IDs.
Duplicate individual criteria. In this grid, you can select specific individual record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate individual records.

In the Field Name column, you can select fields to use in the duplicate search. In the Length column, enter the number of characters to check in each field during the duplicate search.

Automatically check for duplicate individuals. With this business rule, the program automatically searches for duplicate individual records based on duplicate individual criteria when you save a new individual record. In the corresponding field, you can require the program to either disallow duplicate individuals or warn the user if duplicate individuals are found.

Organization Business Rules

With Organization business rules, you set rules for organization IDs and duplicate records.

Automatically generate organization IDs starting with. Mark this checkbox so Registrar’s Office automatically generates new organization ID numbers when you add organizations to the database. You designate the first number to use when creating organization ID numbers.

Organization IDs are [ ] characters long. If you automatically generate IDs, designate the number of characters to use when creating new organization ID numbers.

Prefix organization ID with. You can enter a prefix of up to five characters to add to each new organization ID.

Prevent data entry to the organization ID field. Mark this checkbox to prevent the organization ID field from being edited on records. This business rule prevents missing and duplicate IDs.

Duplicate organization criteria. In this grid, you can select specific organization record fields to use as criteria when searching for duplicate records. The duplicate search is useful for preventing users from entering duplicate organization records.

In the Field Name column, you can select fields to use in the duplicate search. In the Length column, enter the number of characters to check in each field during the duplicate search.
Automatically check for duplicate organizations. With this business rule, the program automatically searches for duplicate organization records based on duplicate organization criteria when you save a new organization record. In the corresponding field, you can require the program to either disallow duplicate organizations or warn the user if duplicate organizations are found.

When creating business relationships, [] address information. When you add an organization as a business relationship to a record, this business rule determines whether an organization’s address is copied and shared between the two records. Your selection here is the default.

Registrar Business Rules

With Registrar business rules, you set rules for Registrar Setup in Configuration.

Display the GPA Cutoff Value column on the Translation Table. Mark this checkbox to display the Cutoff Value column for each GPA type in the GPA view of a translation table. The program uses the Cutoff Value column to translate calculated grade point values back to the grade in the Grade Equivalent column. For example, if you award an A+ for a calculated grade point value of 4.00 or above, enter 4.00 in the Cutoff Value column for A+.
Registration Business Rules

With Registration business rules, you set rules for checking course rules when adding or removing course requests and checking exceptions.

When checking for course rules when adding requests. Designate what the program should do when adding a request and the course has a rule with another course. Select “Always add requests to meet course rules automatically” or “Ask to add requests to meet course rules automatically”.

For example, if you add a request for Economics, this business rule determines whether a message appears asking if you want to add a request for Government or if Government is automatically added.

When checking for course rules when removing requests. Designate what the program should do when deleting a request and the course has a rule with another course. Select “Always remove requests to meet course rules automatically” or “Ask to remove requests to meet course rules automatically”.

For example, if you delete a request for Economics, this business rule determines whether a message appears asking if you want to delete a request for Government or if Government is automatically deleted.

Check for the following exceptions when entering requests. Mark checkboxes for the exceptions the program should check for when entering course requests. When you enter course requests, a screen may appear with a list of exceptions and you can select to override certain exceptions. Exceptions not marked here are automatically overridden.

- Has a different gender than course (only checks if a single gender is associated with a course)
- Has already taken course
- Has already requested course this year
- Assigned to different year than course
- Assigned to different school than course
- Lacks prerequisite
- Does not meet course rule for selected terms
- Is restricted from specified teacher
The exceptions “Is restricted from specified teacher” and “Has already requested course this year” cannot be overridden when entering course requests. The exception “Does not meet course rule for selected terms” can be overridden only when “Try” is the priority.

Scheduling Business Rules

With Scheduling business rules, you set rules for the scheduling process.

Include the following statuses when scheduling. Mark checkboxes of statuses of students to include in the scheduling process. This business rule filters the students included in the scheduling process by status and applies to active student enrollments included in the scheduling process.

Consecutive meetings means less than [ ] minutes between. Define the maximum amount of time between consecutive meetings. For example, if teachers can have up to three classes in a row and should have no more than a five-minute break between the classes, enter “5”.

The program uses this definition in the master schedule to determine whether a teacher has too many consecutive meetings in a day based on the number of maximum consecutive meetings entered on the faculty record. The program uses this definition to determine whether a student has free time.

When creating a new class for a course restricted by pattern. Designate whether the program should use the pattern of the course automatically or ask you whether to use it.

When adding a room or teacher to a meeting. Designate whether the program should update the other meetings of the class automatically, ask you if it should do this, or never do this for the term.

Reflect class schedule changes. Mark this checkbox if changes to a meeting, teacher, or room of a class also update the class in other terms. If you mark the checkbox, select “in all terms” or “in subsequent terms”.

Reflect student schedule changes. Mark this checkbox if changes to a student’s enrollment in a class in a term also update the student’s schedule in other terms. If you mark the checkbox, select “in all terms” or “in subsequent terms”.

Generate request when enrolling in class without a request already present. Mark this checkbox to automatically create a course request if you are enrolling a student in a class that the student did not request.
Allow students to take a maximum of [] classes per term. To designate a maximum number of classes students can take per term, mark this checkbox and enter a number. The program checks for this limit during automatic and manual scheduling.

Grades Business Rules

With Grades business rules, you set rules for decimal places, grade comments, and handling courses taken multiple times.

Show [] trailing zeros in GPAs. The program stores grades as they are entered, except for trailing zeros. Select how many trailing zeros to display in GPAs.

Show [] trailing zeros in numeric grades. The program stores grades as they are entered, except for trailing zeros. Select how many trailing zeros to display in numeric grades.

Separator for default comments. Select how to separate default comments when you select more than one default comment. You can select “Carriage return”, “Space”, “Comma”, “Semicolon”, “Period”, or “End of sentence”.

When awarding credit for courses taken multiple times, use. This business rule determines how to award credit to a student enrolled in multiple classes of the course when the course can earn credit only once (Repeat allowed? field is not marked on the Grades Details screen for a student). Select “the class with the highest grade” or “the most recently taken class” to determine the marking column grade to award credit.

If you select “the class with the highest grade” and the marking columns awarding credit do not match between the classes but there are the same number of marking columns awarding credit, the program matches up the marking columns in order. If there are not the same number of marking columns, the program uses the most recently taken class.

When calculating GPAs including courses taken multiple times, use. This business rule determines marking column grades to include when running GPA calculations for a student that has taken a course multiple times but the course can earn credit only once (Repeat allowed? field is not marked on the Grades Details screen for a student). Select “the class with the highest grade”, “the most recently taken class”, or “all the classes” to determine which marking column grades to include.
When posting grade comments from FAWeb or entering new grade comments in grades, use.
Select the default font and font size to use in grade comments. Changing the font and font size in this business rule does not affect existing comments entered or posted.

When displaying Pass/Fail grades in Report Cards, Transcripts, and NetClassroom, use [ ] to display Pass Grades and [ ] to display Fail grades. Enter the values you want to display for Pass and Fail grades on report cards, transcripts, and grade reports for students with an enrollment type of Pass/Fail.

Calculate quality points using grades from. Select the marking column to use when quality points calculate. The marking column determines which grade and translation table to use in the calculation.

Use GPA equivalents from. Select the GPA calculation to use when the program translates numeric and letter grades to the GPA equivalent on the translation table for the selected GPA type.

Round result up at [ ] using a decimal precision of [ ]. To round results, mark Round result up at [ ] using a decimal precision of [ ]. In the first field, enter the number at which results are rounded. In the second field, enter the number of decimal places to use. An example appears to the right of the field based on what you enter. For example, if you round up at 5 using a decimal precision of 2, “89.005 is rounded to 89.01” appears. If you do not round results, results may be truncated.

Attendance Business Rules

With Attendance business rules, you set rules for attendance entry.

If entering day attendance, and class attendance already exists. If class attendance entries already exist and another user begins to enter day attendance, select whether to warn the user, always allow, or never allow. If warned, the user can select whether to overwrite existing entries.

If entering class attendance, and day attendance already exists. If day attendance entries already exist and another user begins to enter class attendance, select whether to warn the user, always allow, or never allow. If warned, the user can select whether to overwrite existing entries.

If entering day attendance, require users to indicate "attendance taken" when taking attendance by class meeting at this time [ ]. In the meeting at this time portion of the field, you can enter a class time to use as the deadline.

When calculating day attendance from class attendance, calculate using the [ ]. To determine how to translate class attendance to day attendance on reports, select “relative length of classes in a day” or “number of classes in a day”. If you select “relative length of classes in a day”, the program calculates day attendance considering the minutes of classes in a day. If you select “number of classes in a day”, the program calculates attendance considering each class as one unit in the day.

Note: If the result is a fraction, the decimal precision of the day calculations and totals on the report is determined by your Number of digits after decimal for amounts setting on the Miscellaneous panel of the Format tab of the report.
For example, you have eight classes in a day, consisting of four classes lasting 30 minutes each and four classes lasting 60 minutes each. The same attendance code is entered in the four classes lasting 30 minutes each. If you select “relative length of classes in a day”, the program calculates day attendance as the number of class minutes containing the attendance code divided by the total number of class minutes in the day, equaling $\frac{120}{360}$ or 0.33 day. If you select “number of classes in a day”, the program calculates day attendance as four out of eight classes, equaling 0.5 day.

**Letters Business Rules**

When creating a letter from a record, you can select to save the letter as an action. With Letters business rules, you select the action types to associate with each type of letter. Action types are defined in the **Action Type** table. For more information about tables, see “Tables” on page 142.

**Degree Audits Business Rules**

You can control which GPAs and marking column grades appear on the Requirements tab of student records.

**GPA Calculation to use when displaying requirements.** You can select which GPA calculation to use to display GPAs beside degrees, majors, minors, concentrations, and options on the Requirements tab of student records. By displaying GPAs on the Requirements tab, you can quickly review whether students’ GPAs are meeting your GPA requirements, for example, you may require students to have at least a 3.0 GPA in their major course work.

The calculation must be run for the value to appear. Make sure you mark **Run GPA calculations for degrees** when running the GPA calculation. For more information about running calculations, see the **Grades Guide**.

If you do not select a GPA calculation, no GPAs appear on the Requirements tab but “<No calculation defined>” appears.
Marking column grade to use in requirement calculations and display. You can select a marking column to determine which grade appears beside a course on the Requirements tab of student records. For example, you may want to display the final marking column grade.

If you do not select a marking column grade here, no grade appears besides courses on the Requirements tab. The number of credits always appears beside courses on the Requirements tab.

This selection is also used when more than one course can fulfill a requirement. The program uses the course with the higher marking column grade.

Degree Audits Business Rules

You can control which GPAs and marking column grades appear on the Requirements tab of student records.

GPA Calculation to use when displaying requirements. You can select which GPA calculation to use to display GPAs beside degrees, majors, minors, concentrations, and options on the Requirements tab of student records. By displaying GPAs on the Requirements tab, you can quickly review whether students’ GPAs are meeting your GPA requirements, for example, you may require students to have at least a 3.0 GPA in their major course work.

The calculation must be run for the value to appear. Make sure you mark Run GPA calculations for degrees when running the GPA calculation. For more information about running calculations, see the Grades Guide.

If you do not select a GPA calculation, no GPAs appear on the Requirements tab but “<No calculation defined>” appears.

Marking column grade to use in requirement calculations and display. You can select a marking column to determine which grade appears beside a course on the Requirements tab of student records. For example, you may want to display the final marking column grade.

If you do not select a marking column grade here, no grade appears besides courses on the Requirements tab. The number of credits always appears beside courses on the Requirements tab.

This selection is also used when more than one course can fulfill a requirement. The program uses the course with the higher marking column grade.
Residence Life Business Rules

If you have the optional module *Residence Life*, you can set a business rule to include student statuses when you enter residence life information.

Include the following statuses when entering room and board information. You can select which student statuses to include when you enter residence life information. The students whose statuses you do not select are not available for you to enter residence life information. For example, you may not want to assign residence life information to students not yet enrolled.

Class Waitlists Business Rules

With Class Waitlists business rules, you specify how you want the system to manage class waitlists as classes become full during the registration process. Signing up for a waitlist does not guarantee the student will get into the class.
There are differences between course requests and class waitlists. Course requests allow student to request a seat in any class of a particular course. Class waitlists allow students to request a seat in a particular class of a course and are only available once a class is full.

**Allow students to waitlist based on maximum number of [ ] per session.** With this option, you can waitlist students based on the maximum number of classes or credits. Your selection specifies what is counted to determine if the student has reached his maximum amount allowed for a session.

- When you select “credits”, the credits attempted for all the classes the student is waitlisted for with “Ready to enroll” as the status in a session are totaled.
- When you select “classes”, the number of classes the student is waitlisted for with “Ready to enroll” as the status in a session are totaled.

**Session grid.** A row in the Session grid appears for each session you have defined in the sessions table. In the **Maximum** column, enter the number of attempted credits/classes a student can waitlist for in any given academic year and session. If left blank, there will be no maximum check for students on waitlists.

**Students are allowed on [ ] waitlists for a course.** With this option, you can specify that students be allowed on multiple waitlists for a course, or only one.

- When you select “multiple”, the student can sign up for a waitlist even if he is already on the waitlist for another class of the same course in the same session. When you select “only one”, the student cannot sign up for the waitlist if he is already on the waitlist of another class in the same course and session.

  On the course record, the fields **Can be requested multiple times** and **Course can be taken multiple times for credit** do not apply to the waitlist of the classes. The **Can be requested multiple times** field determines whether a student can be enrolled in a course multiple times in the same session. If the field is not checked, a student cannot have more than one student course record for the same course.

**When dropping a student from a class [ ].** When dropping a student from a class, you can have the program “automatically enroll the next student on the waitlist”, or “notify the next student on the waitlist he/she can enroll”.

Please be aware that these options also affect students who transfer out of a class to another, but not the students who are withdrawn from the class.
If you do not want the program to run either of these processes, you can select “faculty/registrar will specify who to enroll”. This will allow your professors or registrar to specify when people can move from the waitlist on an individual basis.

When a class is dropped using the “Drop If Enrolled” functionality in a waitlist, the course will still remain on the student as a course request if a request was present or added when enrolling in the class so that the schedule changes information can be present. If you do not need to retain this information, you can globally delete the requests.

We recommend leaving the “Generate request when enrolling in a class without a request already present” business rule selected to ensure the course request is present.

**Email for Enrolling.** With this option you can create an email for students to receive when enrolled from the waitlist. You must have *NetMail* to send this email. For more information, see “Email for Enrolling” on page 140.

**Email for Offering Seat.** With this option you can create an email for students to receive when their status changes to Registration offered. You must have *NetMail* to send this email. For more information, see “Email for Offering Seat” on page 140.

**When dropping class to enroll in waitlist, set class’s schedule changes reason to [ ].** Enter the reason for the class’s schedule changes. This information will populate the *Reason* field on the schedule change record, if you selected to have this record generated.

**The student has [ ] hours to register before moving onto the next student.** Enter the number of hours the student has to register once he is notified of the class opening. If you do not enter a number, the student has no registration deadline.

**Allow faculty to overload target class size when enrolling from waitlist in FAWeb.** Mark this checkbox to allow faculty to enroll students from the waitlist even when exceeding the target class size.

**When calculating the score for a student, use the following criteria:** This option determines what information is considered when determining the score for a student signing up for a waitlist.

When you select “Date waitlist requested”, the system adds 1 to the highest waitlist score for the class.

When you select “Year using the following increments”, the system sets the *Score* field using the year value of the SPE and the “Number of points between years” value. Using the *Years* grid, you can specify what value each grade level should start at when assigning a score.

**Email for Enrolling**

Use this option to create an email for students to receive when they are enrolled from the waitlist. You must create an email for students if you select the “automatically enroll the next student on the waitlist” business rule. If you do not select that business rule, you can still create an email if you want to notify a student when he is enrolled from the waitlist manually in Scheduling, or in *FAWeb*.

If a student does not have an email type specified, an error will be logged in the *Comments* field of the waitlist record when you send the email.

When sending the email to the student, the data from the waitlist record being processed when the email is sent will be used with merging the fields specified. This means that if the student is also dropped from a class based on the *Drop if Enrolled* field, or if the student is enrolled in a class because of a scheduling rule, the email will only be sent based on the waitlist record being processed.

The email created here will also be visible in *NetMail*. Keep in mind that NetMail does not send emails to records with the *Requests no email* checkbox selected.

**Email for Offering Seat**

With this option you can create an email for students to receive when their status changes to Registration offered. You must create this email if you select “notify the next student on the waitlist he/she can enroll” business rule.

The email is sent when the student’s status is changed to Registration offered (by the business rule or manually).
This email record is required when the Class Waitlists business rule is set to “notify the next student on the waitlist he/she can enroll”.

Queue Business Rules

If you have the optional module Queue, you can set business rules for automatically adding recurring queues to the queue schedule and removing queues from the queue schedule.

Add recurring queues to the schedule list [ ] days BEFORE the scheduled start date. You can select the number of days before the scheduled start date to add recurring queues.

Remove queues from the schedule list [ ] days AFTER they have been processed. You can remove queues from the schedule after they have been processed.

When generating emails from queue, use [ ] to send emails. With this business rule, you can select the email format. Your choices include “MIME” and “UUEncode.” We recommend you use the MIME format because most email client programs support this format. Select “UUEncode” if you are having trouble with attachments, or if you communicate with a domain that continues to use UUEncode.

“From” address for Queue emails. With this business rule, you enter a correctly formatted email address from which the Queue emails will be sent. Please note, if you enter the “Mail from” address on the Miscellaneous tab of a Queue, the address you enter here will be overridden.

If you are on the Windows Server 2008 operating system and want to send scheduled Queue emails, this field is required.

Tables

In a table, you can create a standard list of entries for a field. Selecting a table entry in a field instead of manually entering information increases data entry speed and improves accuracy.

Glossary: A table is a field in which you can predefine entries to save time and promote consistent data entry.

Some tables already contain predefined values, such as the State table. For others, you must define entries for your organization, such as the Student Status table. Some table entries require you to enter only a description, while other table entries require more detail. For example, the Phone Type table requires a type and a phone number format.

Note: Certain tables are shared between all programs in Blackbaud Student Information System.

Although the Tables page in Configuration provides a central location for managing table entries, you can view, add, and edit table entries directly from table fields throughout the program:

- To view a list of table entries available to select for a field, you can click the down arrow on the right side of a field or press F4.
To scroll through the entries, place the cursor in the field and click the down arrow on your keyboard.

To access a screen on which you can view, add, edit, and delete table entries, you can click the field label or place the cursor in the field and press F7.

If you enter text directly in a field and the program does not recognize it as a valid entry, you receive a message asking if you want to add the text as a new table entry.

**Warning:** To ensure consistency of data entry, restrict rights to tables to key users.

To keep entries consistent, it is extremely important that you limit rights to tables. Rights to code tables are controlled in security groups in Administration. Allowing only a few key users rights to code tables ensures the validity of your data.

**Tables**

Most tables are program-defined, correlating to a field in the program. You can define your own tables, such as for attributes.

If table entries for a user-defined table do not exist on any records, you can delete the table. To delete a user-defined table, you must first delete the table entries from all records.

- **Adding a table**
  1. From the Configuration page, click **Tables**. The Tables page appears.
  
  ![Configuration page](image)

  2. At the bottom of the box on the left, click **Add new table**. The New Code Table screen appears.

  ![New Code Table screen](image)

  3. In the **Table Name** field, enter a name.
  4. To allow table entries in the table to have a short description, mark **Use Short Description of**. In the [ ] characters field, enter a number from one to six to designate the maximum number of characters to allow in the short description.

  ![New Code Table screen](image)
5. To save the table and return to the Tables page, click OK.

- **Printing a table**
  1. From the menu bar on the Tables page, select **File, Print**, then select **Code Tables Report**. The Code Table Report screen appears.

    ![Code Table Report Screen](image)

    2. To print specific tables, mark **Include Selected Code Tables Only**. In the **Code tables** box, select the tables to print. Click the right arrow to move your selections to the **Code tables to include** box.

      To print all tables, unmark **Include Selected Code Tables Only**.

    3. To include inactive table entries on the report, mark **Include inactive table entries**.
    4. To include tables without table entries, mark **Include empty code tables**.
    5. To print each table on a separate page, mark **Print one table per page**.
    6. To preview the report, click **Preview**.
    7. To print the report and return to the Tables page, click **Print**.

**Table Entries**

**Note:** We recommend you do not edit table entries while other users are working in the program.

For each table, you can add and rearrange table entries. If you edit a table entry, the program updates the entry on all records. You cannot delete a table entry that is in use, but you can make a table entry inactive.

The order of the table entries in the list determines the order the entries appear when you click the down arrow in the related field on a record. You can place your most popular entries at the top to save time scrolling through less used entries during data entry. You can use the **Up** and **Down** buttons to rearrange the entries on the Tables page.

Order is especially important for the **Marking Column** and **Grade Level** tables.
For credit totals to appear correctly on report cards and transcripts, you must rank your marking columns in the chronological order they occur, regardless of their order in marking column sets in Registrar Setup. For more information about marking column sets, see “Marking Column Sets” on page 37.

**Warning:** You must rank your grade level table entries in ascending order.

- You must rank your grade levels in ascending order, such as from Freshman to Senior.

**Adding a table entry**

1. From the Configuration page, click **Tables**. The Tables page appears.

2. In the **Type** field above the box on the left, select the table types to appear in the box. To view all tables in the box, select “<All Tables>”.

3. In the box on the left, select the table in which to add the new table entry. Existing table entries appear in a grid on the right.

**Note:** You can add a new table entry to a certain point in the table entry list. Select the entry above which to insert the new entry and click **Insert** on the action bar.

4. To add a new table entry in the selected table, click **New Table Entry**. The New Table Entry screen appears.

5. In the **Description** field, enter a description for the new table entry.

6. Depending on the type of table entry you add, other fields may appear such as **Short Description** or **Phone Number Type**.

7. To save the new table entry and return to the Tables page, click **OK**.

8. To add a new table entry, click **New Table Entry** or press **ALT + N**.
Sorting table entries
You can sort table entries in ascending or descending order. Tables with numbers are sorted by the first digit of the entry. For example, 2,000 would come before 40.00 (in ascending order). Therefore, we recommend that you avoid sorting currency tables or tables with dollar amounts, such as the Family Income table.

1. In the box on the left on the Tables page, select the table you want to sort. Table entries appear on the right.

2. Click Sort. The Sort Table Options screen appears.

3. To sort the table in ascending order alphabetically or numerically, in the Sort Order frame, mark Ascending. To sort the table in descending order, mark Descending.

   Note: Short descriptions do not appear on all tables.

4. To sort table entries by descriptions, in the Sort By frame, mark Description. To sort table entries by short descriptions, mark Short Description.

5. To sort your table entries and return to the Tables page, click OK.

Cleaning up table entries

Warning: Before editing table entries, make sure no other users are in the program.

To ensure consistent data entry and accurate queries and reports, we recommend limiting rights to tables to key users. Otherwise, you may have duplicate table entries within a table, for example, “Call”, “Phone Call”, and “Telephone Call” in the Action Type table. However, if you find duplicate table entries, you can use Table Cleanup to replace duplicate entries with one entry. If table entries cannot be replaced, an exception report is generated and lists the exception. Before editing table entries, make sure no other users are in the program.

1. On the Configuration page, click Tables. The Tables page appears.
2. In the box on the left, select the table to clean up. Existing table entries appear in a grid on the right.

3. On the action bar, click **Table Cleanup**. The Table Cleanup screen for the selected table appears. A list of areas in the program that can use the selected table appears in the box on the right.

4. In the `<Table name> table entries to be replaced` grid, select the table entries to replace. The program will replace these entries on all records on which they appear.

   **Note:** If you add a new table entry in the **Replace with** field, a message appears asking if you want to add the new entry to the table. Click **Yes** to add the entry; click **No** not to add the entry.

5. To replace the selected entries, in the **Replace with** field, select a table entry.
6. To delete the entries you are replacing so they cannot be used again on records, mark **Delete table entries that are being replaced**.

7. To replace the entries, click **Replace Now**. An exception report is generated for any table entries that could not be replaced.

8. A message appears telling you that the table cleanup finished successfully. Click **OK**.

9. To return to the Tables page, close the Table Cleanup screen.

### Making a table entry inactive

**Note:** You may have to wait after selecting to delete a table entry while the program checks to see if the table entry is in use. We recommend you make the entry inactive instead.

You cannot delete a table entry used on a record in the program. You can mark a table entry inactive to remove it from the list of available entries. Marking a table entry inactive does not remove it from where it already exists on records in the program.

1. From the Configuration page, click **Tables**. The Tables page appears.

2. In the **Type** field above the box on the left, you can select what table types to appear in the box. To view all tables in the box, select “<All Tables>”.

3. In the box on the left, select the table containing the table entry you want to make inactive. Table entries appear in a grid on the right.

4. Select the table entry and click **Open** on the action bar. The Edit Table Entry screen appears.
5. Mark the **Inactive** checkbox.

![Edit Table Entry](image)

**Note:** On the bottom of the Tables page, you can mark **Display active entries only** to hide inactive tables from your view in the list.

6. To save the change and return to the Tables page, click **OK**. The table entry is no longer available in the associated field in the program.

### Fields

**Glossary:** A field is a data entry box in which you add and store information on records in your database. For example, **Current grade** is a field on a student record.

On the Fields page in **Configuration**, you can control field characteristics for most record types. You can rename some fields and change a field’s status from optional to required, ensuring the field must contain an entry before the record is saved. You can hide fields to prevent data entry to unused fields.

You can view which fields are lookup fields containing table entries from which you can select. Selecting table entries in lookup fields helps standardize entries and increases the consistency and speed of data entry. You can make certain fields lookup fields. When you mark **Lookup** for the field, a message appears asking if you want to create a table for the field. For more information about tables, see “Tables” on page 142.

You can edit field characteristics at any time. However, certain cells may be locked and cannot be changed.

- **Setting field characteristics**

**Note:** If you also have **Admissions Office**, field characteristics are shared between **Admissions Office** and **Registrar's Office**.

1. From the Configuration page, click **Fields**. The Fields page appears.

![Configuration Fields](image)

2. In the box on the left, select a record type.
Note: When you rename a field, the change affects all areas of the program. To ensure consistency and accuracy of reports, avoid using duplicate field names.

3. In the grid for the record type, field names appear in the Field column. To change the display name of a field, you can enter a new name in the Display As column on the same row.

4. To make a field required, mark the checkbox in the Required column. A required field must contain information before the record is saved.

5. To hide a field, mark the checkbox in the Hidden column. A hidden field may contain information but does not appear on a record. You can mark this checkbox to hide fields your organization does not use or no longer uses.

6. In the Lookup column, you can view which fields are lookups, which means that they are associated with a table and table entries.

7. When you exit the fields grid for a record type, the program saves your changes automatically.

Attendance Codes

On the Attendance Codes page in Configuration, you set up attendance codes used in attendance entry. You define absence and tardy codes separately.

When you set up academic years, you designate how to track attendance. You can select to use either class or day attendance or only day attendance.

Day only attendance. If you selected “Day only” in the Track attendance by field of an academic year record, during that academic year, you can enter attendance for students on particular dates only. To define day only attendance codes, select “Day only attendance settings” in the Show field on the Attendance Codes page.

To calculate attendance from day only attendance entries, the program refers to settings on the Attendance Codes page, including:

- Which codes are marked to be included in attendance calculations (Use in Attendance Calculations column),

- Then how much each of these codes is worth, either a full day unit of 1.0 or a half day unit of 0.5 (Weight column).

- If you use tardy codes, how many tardies equal one absence (# Tardies = 1 Absence column). For example, if a student is tardy 4 times, you may want to count this as one absence.

Class or day attendance. If you selected “Class or day” in the Track attendance by field of an academic year record, during that academic year, you can enter attendance for students either on a particular date or for individual classes on that date. If you enter attendance for a student on a particular date, the attendance entry appears for all of the student’s classes on that date.

To calculate attendance, the program refers to a business rule and settings on the Attendance Codes page, including:

- The attendance business rule When calculating day attendance from class attendance, calculate using. If you select “relative length of classes in a day”, the program calculates day attendance considering the minutes of classes in a day. If you select “number of classes in a day”, the program calculates attendance considering each class as one unit in the day. For example, you have eight classes in a day, consisting of four classes lasting 30 minutes each and four classes lasting 60 minutes each. The same attendance code is entered in the four classes lasting 30 minutes each. If you select “relative length of classes in a day”, the program calculates day attendance as the number of class minutes containing the attendance code divided by the total number of class minutes in the day, equaling 120/360 or 0.33 day. If you select “number of classes in a day”, the program calculates day attendance as four out of eight classes, equaling 0.5 day.

- Which codes are marked to be included in attendance calculations (Use in Attendance Calculations column on the Attendance Codes page).
• If you use tardy codes, how many tardies equal one absence (# Tardies = 1 Absence column on the Attendance Codes page). For example, if a student is tardy 4 times, you may want to count this as one absence.

You cannot delete an attendance code if it is present for at least one attendance entry, but you can make an attendance code inactive so it is no longer available during attendance entry.

- Adding an attendance code in the class and day attendance view

In the class and day attendance view, you set up absence and tardy codes to use for taking attendance by either class or full day.

1. From the Configuration page, click Attendance Codes. The Attendance Codes page appears.
2. In the Show field, select “Class or day attendance settings”.

3. In the Absence Codes grid, define codes to use for absences.
   - In the Code column, enter an attendance code.
   - In the Description column, enter a description of the attendance code.
   - To count instances of the code in attendance calculations, such as absence totals, mark Use in Attendance Calculations.
   - To permit the code to represent an entire day, mark Allow Daily Entry. This enables you to designate different codes for class and day attendance.
   - To permit Faculty Access for the Web users to enter the code, mark Allow Entry by Faculty.

4. In the Tardy Codes grid, define codes to use for tardies.
   - In the Code column, enter the attendance code.
   - In the Description column, enter a description of the attendance code.
   - To count instances of the code in attendance calculations, such as tardy totals, mark Use in Attendance Calculations.
   - If you are counting tardy codes in calculations, in the # of Tardies = 1 Absence column, you can enter the number of tardies that counts as one absence.
   - To permit the code to represent an entire day, mark Allow Daily Entry. This enables you to designate different codes for class and day attendance.
• To permit Faculty Access for the Web users to enter the code, mark Allow Entry by Faculty.

5. When you leave the Attendance Codes page, the program saves your changes automatically.

- Adding an attendance code in the day only attendance view

In the day only attendance view, you can set up absence and tardy codes to use for taking attendance by either half day or full day.

1. From the Configuration page, click Attendance Codes. The Attendance Codes page appears.
2. In the Show field, select “Day only attendance settings”.

3. In the Absence Codes grid, define codes to use for absences.
   • In the Code column, enter the attendance code.
   • In the Description column, enter a description of the attendance code.
   • To count instances of the code in attendance calculations, such as absence totals, mark Use in Attendance Calculations.
   • In the Weight column, you can select to count the absence as a full day or a half day.
   • To allow Faculty Access for the Web users to enter the code, mark Allow Entry by Faculty.

4. In the Tardy Codes grid, define codes to use for tardies.
   • In the Code column, enter the attendance code.
   • In the Description column, enter a description of the attendance code.
   • To count instances of the code in attendance calculations, such as tardy totals, mark Use in Attendance Calculations.
   • If you are counting tardy codes in calculations, in the # of Tardies = 1 Absence column, you can enter the number of tardies that counts as one absence.
   • To allow Faculty Access for the Web users to enter the code, mark Allow Entry by Faculty.

5. When you leave the Attendance Codes page, the program saves your changes automatically.
Making an attendance code inactive
When you no longer want an attendance code available for new attendance entry, you can make it inactive.
1. From the Configuration page, click Attendance Codes. The Attendance Codes page appears.
2. Locate the code in the grid and mark Inactive in the row for the code.
3. When you leave the Attendance Codes page, the program saves your changes automatically.

NetClassroom
If you have the optional module NetClassroom, the NetClassroom page appears in Configuration. You can configure several areas of NetClassroom:

- **Customize.** You can customize NetClassroom for your school by renaming “NetClassroom”; replacing the NetClassroom logo; linking the logo to your school’s URL; setting colors of various elements of NetClassroom; and listing additional Web sites to appear on users’ Home pages.
- **Features.** You can select which features are available to relations and students by school.
- **Grades and Years to Display.** You can select which marking columns and academic years are available to NetClassroom users.
- **Registration Setup.** You can set up how course requests and enrollments should work in NetClassroom. For example, you select which exceptions should be checked.
  - You create a setup for each school, academic year, and session combination. In a setup, you can enter instructions to appear on the page, specify whether students can enter requests or enroll in classes, and define groups of students within the setup.
  - In each group of students, you specify when students can access the Registration page, when their relations can view information, and control the courses for which they can enter requests or enroll in classes. You can group students however you want. For example, you may group students by year.
- **Announcements.** You can enter announcements to appear on NetClassroom users’ Home pages. You control the date range for when each announcement appears and to which schools each announcement applies.
- **Course Catalog Setup.** You can select the information to appear for courses in the course catalog in NetClassroom by school.
Schedule Setup. You can select the information to appear for courses and class meetings on schedules in *NetClassroom* by school.

Password Contact. You can set the contact information to appear if students or relations incorrectly answer password security questions for their *NetClassroom* login.

Miscellaneous. You can select how to format marking column grades and faculty names appearing in *NetClassroom* by school.

For an implementation checklist of steps to follow to set up and use *NetClassroom*, including configuration, see the *Administration Guide for NetClassroom*.

- **Customize NetClassroom**
  1. From the Configuration page, click *NetClassroom*. The NetClassroom page appears.
  2. From the list on the left, select **Customize**.

![Configuration NetClassroom](image)

**Note:** To reset the heading to “NetClassroom”, delete the value in this field.

3. In **Replace “NetClassroom” with**, you can enter a name or abbreviation to replace “NetClassroom” on all the pages, such as “Phillips College” or “NetPC”.

   If you change the name, you can also give users a URL with the customized name (such as http://<WebServer>/NetPA) if you rename the NetClassroom7 virtual directory on the server. For instructions for renaming a directory on a *Windows 2003* server, visit [www.microsoft.com](http://www.microsoft.com) and see Knowledge Base Article #311626.

4. In the **Colors to Use** box, you can set the colors of various items in *NetClassroom*. In the **Color** column for each type of item, you can select a color by either clicking the down arrow or the color palette.

**Note:** To reset the logo to the *NetClassroom* logo, delete the value in this field.

5. To replace the *NetClassroom* logo with another image, save the new image file in the directory where you installed *NetClassroom* on your Web server. The default directory is C:\Program Files\Blackbaud\NC7.

   In **Replace logo with**, enter the path to the new logo file in the following format: http://<WebServer>/NetClassroom7/<LogoFile>, where <WebServer> is the computer name of your Web server and <LogoFile> is the name of the image file you added.

   The image size used in *NetClassroom* is 1-inch by 1-inch. You may need to adjust the size of your new image file.
If you plan to replace the default NetClassroom logo, we recommend you do this before users access NetClassroom. Once a user has viewed the NetClassroom pages on a computer, the new logo will not be visible on that computer until the user clears the temporary Internet files.

6. In **Enter the URL of your school’s home page (This will link the logo displayed to your page):**, enter the address of your school’s Web site. This sets the NetClassroom logo as a link to your Web site. To create the link, you must enter the complete URL, including the http:// prefix, such as “http://www.phillipscollege.org”.

If you do not link the NetClassroom logo to your Web site, users return to the NetClassroom login page if they click the logo.

7. In the **Additional links** box, you can list Web sites to appear in the Additional Links section of users’ Home pages in NetClassroom. The Web sites appear in the order they appear in this grid.
   - In the **Text** column, enter the text to proceed the Web site link. For example, enter “For class pages, see:”.
   - In the **Web address** column, enter the URL for the Web site link beginning with a prefix of http://, https://, or mailto://. For example, enter “http://www.blackbaud.com/classpages”.
   - In the **Include** column, select to include the link for all or selected schools. If you select selected schools, in the **Selected Schools** column, click the binoculars to choose the schools.

8. When you leave the Customize page, your settings are saved automatically.

- **Grant rights to features**
  1. From the Configuration page, click **NetClassroom**. The NetClassroom page appears.
  2. From the list on the left, select **Features**.

![Configuration - NetClassroom](image)

**Note:** Users can customize what appears on their Home page in NetClassroom. These customization settings are shared between students and relations for the schedule, grades, assignments, and class announcements, so we recommend you grant the same rights to these features for both students and relations.

3. Select whether to set the features for all schools in your organization, or select a school to set features for in the **Settings below apply to** field.

   If you select to set features by school, complete procedure step four for each school in your organization.
4. In the **Features available for relations** box, mark the checkbox for each feature to make available to relations. In the **Features available for students** box, mark the checkbox for each feature to make available to students.

- To grant rights to the Schedule page, mark **Schedule**. On this page, users can view a student’s schedule by academic year, session, and term in list, grid, or calendar format.

- To grant rights to the Grades page, mark **Grades**. On this page, users can view marking column grades by academic year and session. If you also grant users rights to the Daily Grades page (by granting rights to either or both the **Daily Grades** or **Running Total** features), each marking column grade is a link to the Daily Grades page.

- To grant rights to the Attendance page, mark **Attendance**. On this page, users can view attendance entries by academic year. Users can select to view attendance by day or by class.

- To grant rights to the Conduct page, mark **Conduct**. On this page, users can view a student’s conduct records by academic year. For each conduct record, the page lists the date, infraction, consequences, the faculty/staff member who reported the infraction, the faculty/staff member assigned to the consequence, and the status of each consequence.

- To grant users rights to change their own primary address information in **Registrar’s Office**, mark **Change Address**. If addresses are linked, a change to the address through NetClassroom updates the linked addresses.

- To grant users rights to change their **NetClassroom** passwords, mark **Change Password**.

- To grant rights to the Course Catalog page, mark **Course Catalog**. On this page, users can select to view the course catalog by school, academic year, session, term, and department. You select options for how the course catalog appears in “Set up the course catalog” on page 163.

- To grant rights to the School Calendar page, mark **School Calendar**. On this page, users can view events on the school calendar by day, week, or month.

- To display a faculty email address link on each Faculty Information page, mark **Parent to Faculty Email** and **Student to Faculty Email**. If granted rights, users can click the link to contact faculty members via email from NetClassroom.

If you grant right for users to send email to faculty, be sure to set the phone type used to designate email addresses on faculty/staff records in step 6.

- To grant rights to view the published transcript, mark **Transcripts**. On this page, users can view a student’s transcript published from **Grades** in **Registrar’s Office**. For more information about publishing transcripts, see the **Grades Guide**.

- To grant rights to view the published report card, mark **Report Cards**. On this page, users can view a student’s report card published from **Grades** in **Registrar’s Office**. For more information about publishing report cards, see the **Grades Guide**.

- To grant rights to the Assignments page, mark **Assignments**. On this page, users can view assignment information by day, week, or month.

If you also grant users rights to the Daily Grades page (by granting rights to either or both the **Daily Grades** or **Running Total** features), users can open the Daily Grades page by clicking the check mark picture beside a class name.

Teachers enter assignment information in **Faculty Access for the Web**. For an assignment to appear in NetClassroom, the teacher must enter dates in the **Student Date Due** and **Show Assignment** columns on the Assignments page in the **Faculty Access for the Web** gradebook.

- To grant rights to the Daily Grades page, mark **Daily Grades** or **Running Total**. If you mark **Daily Grades** only, users can view the assignment grades grid, which lists each assignment, assignment grade, and assignment comment. In the **Grade to Display** field on the Daily Grades page, users can select to list the grades in the grid as a percentage (score divided by maximum achievable score) or the actual numeric value. If you mark **Running Total** only, the Daily Grades page displays the running marking column average and a running average for each category. It lists the percentage of the grade each category is worth. If you mark both **Daily Grades** and **Running Total**, users can view the assignment grades grid and all running averages.
For an assignment grade to appear in *NetClassroom*, the teacher must enter a date in the **Show Grade** column on the *Assignments* page in the *Faculty Access for the Web* gradebook.

- To access the *Registration Setup* page on the *NetClassroom* page of *Configuration*, mark **Registration**. For more information about *Registration Setup*, see “Set up the *Registration page*” on page 156.
- To grant rights to view progress in detail or summary, mark **View Degree Audit**.
- To grant rights to view published billing statements, mark **Statements**. On this page, users can view the statement published from *Mail* in *Student Billing*. For more information about publishing statements, see the *Mail Guide* for *The Financial Edge*.
- To grant rights to pay student bills online, mark **Bill Pay**.
- To grant rights to view their actions on their calendars, mark **Actions**.
- To grant rights to view class announcements, mark **Class Announcements**.

5. Under **For all schools**, select if *NetClassroom* users are allowed to reset their password.
   If you select this option, in *NetClassroom*, users set up password security questions. If a user forgets his password, he will need to answer his password security questions to reset his password.

6. In **Contact types to use for faculty/staff**, select the contact types assigned to e-mail addresses on faculty/staff records in *Registrar’s Office*. This instructs the program which email address to use if you granted rights to *Parent to Faculty Email* or *Student to Faculty Email*.

7. When you leave the *Features* page, your settings are saved automatically.

- **Grant access to marking columns and academic years**
  1. From the *Configuration* page, click **NetClassroom**. The *NetClassroom* page appears.
  2. From the list on the left, select **Grades and Years to Display**.

   ![Configuration + NetClassroom](image)

   3. In **Marking columns to display**, mark checkboxes for each marking column to be available to *NetClassroom* users. You can select from all marking columns defined in marking column sets in *Registrar’s Office*.

   4. In **Academic years to display**, mark checkboxes for each academic year to be available to *NetClassroom* users. To avoid user confusion, grant rights to an academic year only after you finish scheduling classes, teachers, and students for the year. This setting does not affect the *Registration* page.

   5. When you leave the *Grades and Years to Display* page, your settings are saved automatically.

- **Set up the *Registration* page**
  1. From the *Configuration* page, click **NetClassroom**. The *NetClassroom* page appears.
2. From the list on the left, select **Registration Setup**.

3. In the **Check for the following exceptions when entering requests/enrollments** box, mark checkboxes for the exceptions the program should check when students are entering their requests or enrollments in **NetClassroom**. Students cannot override the exceptions you mark.

4. In **Display course using**, select “Course ID”, “Course Name”, or “Course ID - Course Name”.

5. In **Department heads are designated with**, select which position is considered a department head. Positions are defined in the **Position** table in **Configuration**. In **Faculty Access for the Web**, department heads can access all student requests for courses in their department.

6. In **Sort/requests enrollments by**, select “Department”, “Course ID”, “Course Name”, or “Course Type”. This determines how information is sorted in **NetClassroom** and when viewing requests by student in **Faculty Access for the Web**.

7. Mark the **Allow students to waitlist through registration** checkbox to show full classes in the class dropdowns on both the Edit Registration page, and the waitlist grid on the Registration page.

   If the student has been offered registration, this information displays automatically.
8. In the grid, you define access to the Registration page in *NetClassroom* for a school, academic year, and session. On the action bar, click **New**. The New Setup screen appears.

9. In the **Academic year** and **Session** fields, select the time frame for the setup.

10. In **Instructions for registration page**, enter the text to appear in *NetClassroom*.

    You can enter hyperlinks in the instructions, for example, links to Web sites. To enter a hyperlink, you must begin with the applicable prefix. The prefixes http://, https://, ftp://, and mailto: are allowed.

11. In the **Instructions for waitlist page** box, enter the instructions you want to appear in *NetClassroom* on the Edit Waitlist page. You can enter instructions only if you select “enroll in classes” or “enter waitlists only” in the **Students can** field.

12. In the **Students can** field, select what the students are allowed to do for the selected school, academic year, and session. You can select “enter course requests”, “enter waitlists only”, or “enroll in classes”.

13. If you selected “enroll in classes” or “enter waitlists only” in the **Students can** field, in **Display classes using**, select how classes appear in *NetClassroom*.

14. If you selected “enroll in classes” or “enter waitlists only” in the **Students can** field, in **Display first meeting using**, select how first meetings appear in *NetClassroom*.

15. To display credit information in *NetClassroom*, mark **Show credit information for courses selected**.

17. In the Group name field, enter a name for the group.

18. In the Start date and End date fields, enter the date range that the students can access the selected academic year and session in NetClassroom.

   To avoid students changing enrollments in NetClassroom after the withdrawal date, make sure the end date is before the withdrawal date. Withdrawal dates are defined on the Terms tab of session records. For more information about session records, see “Academic Years” on page 90.

19. If you selected “enter requests” in the Students can field on the New Setup screen, in the Maximum number of requests field, enter the maximum amount of requests that a student can enter. There are a few things to keep in mind when entering this number:
   - The number you enter should include mandatory course requests.
   - The number you enter should include the rows you enter in the Requests for Students to Enter grid on this screen.
   - A main request with an alternate request counts as one request.
   - A global alternate counts as one request.

   If you selected “enroll in classes” in the Students can field, the maximum number of classes per term set in scheduling business rules appears for informational purposes only.

20. If you selected “enter requests” in the Students can field on the New Setup screen, mark Can enter if students can enter alternate requests. Then select if students can enter main alternates only, global alternates only, or both main and global alternates.
21. In the **Students are restricted to the following courses** field, you can select a course query so students can request or enroll in courses only within that query. Click the binoculars to select a query or create a new query. For more information about queries, see the *Query Guide for Blackbaud Student Information System*.

If you do not select a query, students can request or enroll in any course associated with the selected school with restrictions defined for the selected academic year and session.

**Note:** For a relation to be able to view a student in *NetClassroom*, **View NetClassroom** must be marked for the relation on the Relationships tab of the student record.

22. In **Relations can approve/view information from [ ] to [ ]**, enter the date range that the students’ relations can view and approve requests in *NetClassroom*. If you do not want relations to view student requests in *NetClassroom*, leave these date fields blank.

23. In the students grid, you can filter the students included in the group. For more information about filtering, see the *Program Basics Guide*.

Students must have student progression entries for the selected school and academic year to be included.

24. In the next grid, you can set up specific requests/enrollments to appear for students to select. If you selected “enter requests” in the **Students can** field, this grid is named **Requests for Students to Enter**. If you selected “enroll in classes” in the **Students can** field, the grid is named **Courses for Students to Enroll**.

When planning what to enter in this grid, consider how you want the Registration page to appear for students in *NetClassroom*. If you allow students to enter more requests or enroll in more classes than the number of rows you define, an **Additional requests/classes** grid appears in *NetClassroom* for students. You can define your five required requests in the **Requests for Students to Enter** grid, but allow students to enter their elective request in the **Additional requests** grid in *NetClassroom*.

![Image](image_url)

**Note:** Remember to include the number of rows you add in the maximum number of requests.

25. To add a new row to the **Requests for Students to Enter/Courses for Students to Enroll** grid, click **New Row**. You can add up to 30 rows in the grid.

26. In the **Text** column, enter the text to appear on the page.
27. In the **Include** column, select “Selected”. The Selected Courses screen appears.

![Selected Courses screen](image)

28. Select the courses the student can choose from.

The selected courses will appear in *NetClassroom* if restrictions are set on the course for the academic year and session and, if you selected a query in the **Students are restricted to the following courses** field, the course is included in that query.

29. To close the Selected Courses screen and return to the New Group screen, click **OK**.

![New Group screen](image)

30. To close the New Group screen and return to the New Setup screen, click **OK**.
31. To save the setup and return to the Registration Setup page, click **Save and Close**.

Once you save a setup, you cannot change the selected school, academic year, and session of the setup.

32. When you leave the Registration Setup page, your settings are saved automatically.

- **Enter announcements**
  1. From the Configuration page, click **NetClassroom**. The NetClassroom page appears.
  2. From the list on the left, select **Announcements**.

3. In the **Start Display** column, enter the first day to display the announcement.

4. In the **End Display** column, enter the last date to display the announcement. The announcement stops appearing the day after the date you enter.

**Note:** In the **Show announcements displaying** field above the grid, you can filter the announcements appearing in the grid by date.

5. In the **Name** column, enter the name of the announcement. For example, enter “Final Grades”.

6. In the **Announcement** column, enter the message to appear. For example, enter “Final grades will be available on-line on 12/15/06”.

7. In the **Include** column, select whether the announcement should appear for all or selected schools. The selected schools determine which students and parents see the announcement, based on the student’s current school.

   If you choose Selected, the Selected Schools screen appears so you can select the schools.

8. To move a school into the **Include these schools** box, select the school and click the right arrow.

9. When you finish selecting schools, click **OK**.
10. The selected schools appear in the Selected Schools column.
11. When you leave the Announcements page, your announcements are saved automatically.

Set up the course catalog
1. From the Configuration page, click NetClassroom. The NetClassroom page appears.
2. From the list on the left, select Course Catalog Setup.
3. Select whether to set the course catalog options for all schools in your organization, or select a school to set course catalog options for in the Settings below apply to field.
   If you select to set options by school, complete procedure steps four to nine for each school in your organization.
4. In Display course catalog section as, select how to format the course catalog in NetClassroom.
   • If you select “Course Catalog”, students and parents can select to view course information by course.
   • If you select “Master Schedule”, students and parents can select to view course information by class.
5. If you selected “Course Catalog” in Display course catalog section as, you can select Include courses that are no longer offered to also include courses no longer offered in the course catalog. This refers to the Course is no longer offered checkbox on the Course tab of course records.
6. If you selected “Course Catalog” in Display course catalog section as, you can select to include courses without course restriction information.
7. If you selected “Course Catalog” in Display course catalog section as, in Include only [ ] courses, select to include both mandatory and standard courses or standard courses only. Keep in mind that transfer courses never appear in the course catalog.
8. In the Course Information to Display grid, select the identifying information to appear for the course or class.
9. In the Additional Information to Display grid, you can select details to appear for each course. In the Heading column, you can enter a different heading to appear for each display item.
10. If you selected “Master Schedule” in Display course catalog section as, in the Meeting Information to Display grid, select the details to appear for each class meeting.
11. When you leave the Course Catalog Setup page, your selections are saved automatically.

Set up the schedule
1. From the Configuration page, click NetClassroom. The NetClassroom page appears.

Note: In the School field above the grid, you can filter the announcements that appear in the grid by school.
2. From the list on the left, select **Schedule Setup**.

![Schedule Setup](image)

3. Select whether to set the schedule setup options for all schools in your organization, or select a school to set schedule setup options for in the **Settings below apply to** field.
   
   If you select to set options by school, complete procedure steps four and five for each school in your organization.

4. In **Display the following course information** and **Display the following meeting information**, mark checkboxes for the course and class meeting information to appear on schedules in **NetClassroom**.

5. In **Display the following course attributes**, you can mark checkboxes for attribute information to appear on schedules in **NetClassroom**.

6. When you leave the Schedule Setup page, your selections are saved automatically.

- **Set the password contact information**
  
  1. From the Configuration page, click **NetClassroom**. The NetClassroom page appears.
  
  2. From the list on the left, select **Password Contact**.

![Password Contact](image)

3. If students and relations do not remember their **NetClassroom** user ID or forget their password security questions, enter the name, phone number, and email address of the person for them to contact.
4. When you leave the Password Contact page, your selections are saved automatically

- **Set miscellaneous options**
  1. From the Configuration page, click **NetClassroom**. The NetClassroom page appears.
  2. From the list on the left, select **Miscellaneous**.

![NetClassroom Configuration Screen](image)

3. Select whether to set the miscellaneous options for all schools in your organization, or select a school to set miscellaneous options for in the **Settings below apply to** field.

   If you select to set options by school, complete procedure steps four and five for each school in your organization.

4. In **Display marking column averages/grades as**, select the format for how grades should appear in NetClassroom.

5. In **Format faculty name using**, select the format for how faculty names should appear in NetClassroom.

6. When you leave the Miscellaneous page, your selections are saved automatically.

### Classifications Configuration

With classifications, you determine how to group students based on the number of credits in which they are enrolled. For example, you might create a Full-Time classification for students with 12.0 to 18.0 credits, a Part-Time classification for students with 1.0 to 11.9 credits, and an Audit only classification for students with 0.0 to 0.0 credits who are taking classes but not earning credits. A student’s grades do not affect classification.

You can also designate a school that a student must be in and a degree a student must have in order to be assigned the classification. This is useful if you offer both undergraduate and graduate courses at your school. Since a classification can be defined by school, you can bill students associated with each school differently.

If you do not create a student classification for every possible session or credit hour range, any student who falls outside the defined ranges will have a classification of “Undefined” and will not be billed.

When calculating student classifications, the program does not include “Other Courses” which are transfer courses or courses taken in a manner other than being enrolled in the class. If you need an “Other Course” to count as part of a classification and it does not match an existing course, you can create a standard course and then enroll the students in a class for that course. If the course was taken at another school and you want the transfer school’s name included with the course on report cards and transcripts, you can use an attribute or include the school’s name in the course name.

**Note:** For more information about setting up Registrar’s Office and billing integration, see the Registrar’s Office and Billing Integration chapter of the **Configuration Guide for Student Billing**.

If you have **Student Billing**, classifications are shared with **Registrar’s Office** so that if you make changes to a student’s classification in one program, the changes appear in the other program. **Student Billing** uses the student’s classification and other information defined in the determination tables to calculate charges. For more information about determination tables, see the **Configuration Guide for Student Billing**.
Adding a student classification

1. From the Configuration page, click Classification. The Classification page appears.

2. To add a new classification, click New Classification. The New Classification screen appears.

3. In the Classification field, select or enter a classification. If you enter a new classification, a message appears asking if you want to add it to the Classification table.

4. In the Session field, select a session.

   You cannot edit the session field once a student has the classification. To change the session, you can unmark all of the academic years and save the classification record. This removes the classification from all students. Then open the classification record, change the session, and re-mark the academic years.

5. In the School field, select the current school that a student must be in to be assigned this specific classification.

6. In the Credit enrolled from [ ] to [ ] fields, enter the minimum and maximum number of credit hours required for the classification.
You cannot edit the number of credit hours once a student has the classification. To change the number of credits, you can unmark all of the academic years and save the classification record. This removes the classification from all students. Then open the classification record, change the credit hours, and re-mark the academic years.

7. **In Academic years to include**, mark the academic years to associate with the classification. Classifications apply to all schools to which the selected academic years and session apply. You can select to use the same academic year in multiple classifications if the degree or school are different.

![Classification Configuration](image)

8. **In Degrees to include in the calculation**, mark the degree a student must have in order to be assigned this specific classification. This section is only enabled when you have the optional module *Degree Audits*.

9. In the **This classification is considered** field, select “Full time”, “Half time or more”, or “Less than half time”. This field is used in the 1098T form to determine which students should be marked as at least half time.

10. Click **Save and Close** to save the classification and return to the Classifications page.

### Hold Codes Configuration

**Note:** If you also *Student Billing*, hold codes are shared between *Registrar’s Office* and *Student Billing*.

On the Hold Codes page in *Configuration*, you define hold codes and restrictions for students. Hold codes prevent students from performing certain tasks until they complete a responsibility. When you put a student on hold, you encourage them to complete their responsibilities. For example, you can put students on hold by not allowing them to register for classes until they pay their tuition.

**Note:** To restrict a student from being assigned housing, you must have optional module *Residence Life*. 
In **Blackbaud Student Information System**, you can restrict the student from receiving a report card, receiving a transcript, registering for classes, being assigned housing, or, if you have the optional module **NetClassroom**, accessing **NetClassroom**. However, you do not have to mark a restriction. If the hold code restricts an activity you monitor outside of **Blackbaud Student Information System**, you create a hold code without restrictions. For example, a student has a behavior incident on record and is not allowed to attend athletic events. You place a hold on the record but not a restriction because you monitor athletic event attendance with other methods.

When you define hold codes, if you use **Student Billing**, you can also update a student’s billing status.

- **Define a hold code**
  
  1. From the Configuration page, click **Hold Codes**. The Hold Codes page appears.

![Hold Codes Page](image)

**Note**: To assign a **NetClassroom** restriction, you must have the optional module **NetClassroom**.

![New Hold Code Screen]

3. In the **Hold code** field, enter the name, up to 60 characters, for the hold code.

4. In the **Who to contact** field, select or enter a contact for the hold code. If you enter a new contact, a message appears to ask if you want to add it to the Who to Contact table.

**Warning:** We recommend you not use pronouns in the **Default reason** field.

5. In the **Default reason** field, enter a reason for the hold code. The default reason appears on the entry in the student’s hold code log and in hold code error messages.

   In the **Displays as** field, your choices thus far appear as they will on the student’s record.

6. In the **Restrict the student from** box, mark the restrictions to associate with the hold code.
7. To update the student’s Student Billing status, mark Update the student to the following billing status when adding this Hold code and select the billing status.

8. Click Save and Close to save the hold code and return to the Hold Codes page.

Test Type Definitions

Many standardized tests have several subject areas that are scored separately. For example, the ACT Test scores students in English, Mathematics, Reading, and Science and includes a Composite Score. You can track these scores in Blackbaud Student Information System. On the Test Type Definitions page in Configuration, you can define the subject areas for each test type.
Define a test type

1. From the Configuration page, click **Test Type Definitions**. The Test Type Definitions page appears.

2. On the Action bar, click **New Test Type Definition**. The New Test Type Definition screen appears.

3. From the **Test type** field, select or enter the standarized test whose subtests you want to define. For example select “SAT”.

4. In the **Subtests to Include** grid, select or enter a subtest that should be used to calculate a total score for the test type selected in step 3.

   We recommend that you do not add every subtest of a particular test type definition. Not every student record will have all applicable subtests. For example, the SAT has many subtests that do not determine a student’s final score. Also, not every student takes all SAT subtests. However, you can add subtests to the Test tab of the student record without associating it to a particular test type.

   **Note:** Inactive subtests that appear on a student record are still calculated in the total score. If an inactive subtest does not appear on the student record, it is not calculated in the total score.

5. In the **Determine best score using** field, select one of the following to determine how to calculate the best score for the selected test type.

   - Single highest score
   - Highest composite score
   - Average of three highest scores
   - Average of five highest scores
   - Average of highest three scores
   - Highest of first three scores
   - Average of highest four scores
   - Average of highest two scores
   - Highest of first two scores
   - Average of highest two and lowest scores
   - Highest of first two scores
   - Lowest of last two scores
   - Highest of first two scores
   - Lowest of last two scores
   - Average of highest two scores
   - Single highest score
   - Highest composite score
   - Average of three highest scores
   - Average of five highest scores
   - Average of highest three scores
   - Highest of first three scores
   - Average of highest four scores
   - Average of highest two scores
   - Highest of first two scores
   - Lowest of last two scores
   - Highest of first two scores
   - Lowest of last two scores
   - Average of highest two scores
• “single highest composite score” – The Blackbaud Student Information System adds every subtest for each date to determine the composite score. The date with the highest score is considered the best score. If a subtest has multiple entries on the same date, the system uses the highest subtest value to determine the composite score. For example, a student submits two sets of scores for Mathematics, Verbal, and Writing. The Blackbaud Student Information System would add the scores from both dates and the date with the highest score is determined to be the best composite score.

Subtests without a date or a score are not calculated in the composite score. For those subtests without a date, the message “Missing subtests for best score” appears where the subtests total value should be.

• “most recent composite score” – The system uses a group of subtests with the latest dates and totals them together to get the composite score. All the subtests must have the same date. If a subtest has multiple scores on the same date, the system uses the highest score to determine the composite score. For example, a student submits SAT scores taken on October 1, 2007 and Jan 15, 2008. The Blackbaud Student Information System calculates the composite score from the Jan 15, 2008 test.

Subtests without a date or a score are not calculated in the composite score. For those subtests without a date, the message “Missing subtests for best score” appears where the subtests total value should be on the Test tab of the student record.

• “combined highest composite score” – For each subtest in the test type definition, the system compares the subtest scores to determine the highest value. The system calculates the highest value of each subtest to determine the best score for the test type.

If there are multiple scores for the same subtest where the scores are equal but the dates are different, the system determines the best score using the first test record entry. For example, a student took the English subtest of the SAT three times. Each time, the student scored a 650. When the student submits those scores to the school, The Blackbaud Student Information System uses the 650 score from the first test.

A comparison cannot be made for subtests without a score. The subtest appears as a row on the Test tab of the student record, but the score information is blank. Also, the total best score is not calculated and the message “Missing subtests for best score” appears where the subtests total value should be.

6. To save the new test type definition, click OK. You return to the Test Type Definitions page.

Test Equivalents

You can compare the scores from different standardized tests by defining test equivalents in Configuration. On the Test Equivalents page, you can define corresponding test score ranges for each test type.

You can use test equivalents to compare each test score on a student’s record to a similar test type. For example, you define an SAT test score range of 400-800 and an ACT test score range of 1-18. If a student has a total SAT score of 780, that score falls into the defined SAT range of 400-800 but it also corresponds with the ACT equivalent range of 1-18.
Define test equivalents

1. From the Configuration page, click Test Equivalents. The Test Equivalents screen appears.

2. In the Test Type 1 column, select the name the test type. For example, select “SAT”.

   Note: Test 1 From Score is a required field. You must enter a value in this field to save the test score range.

3. In the Test 1 From Score and To Test 1 Score columns, enter first test score range. For example enter “400” and “800” in both columns to create a SAT test score bucket of 400-800.

4. In the Test Type 2 column, select the name of the second test type. For example, select “ACT”.

5. In the Test 2 From Score and To Test 2 Score columns, enter the second test score range. For example enter “1” and “18” in both columns to create an ACT test score bucket of 1-18.

6. Repeat steps 2-5 to create additional test score buckets.

7. To save your test equivalents, click OK. You return to the Configuration page.
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