

Train the Trainer Modules: Curriculum Management

7.2.1 Manage Term Activation

Introduction

This chapter provides an overview of term activation, lists prerequisites, and discusses how to run batch term activation.

Overview

A student must be term activated to be able to enroll in classes, or have transfer credit posted.

Prerequisites

1. Before you can activate students into a term, you must activate students into academic programs and plans for that term.
2. Classes must be scheduled. Student must be matriculated.
3. Set up default enrollment limits on the Term Enrollment Limits page of the *Academic Program Table* component.
4. Define term control date default values on the academic calendar.

Term Activation Criteria's

Each term, activating students is a prerequisite process for enrolling students, posting transfer credit, and calculating tuition. To successfully activate a student into a term for a specific academic program, the term activation request must meet the following three criteria:

1. The maximum program effective date for the activation term must be later than or equal to the effective date of the student's academic program record.
2. The term must be later than or equal to the student's admit term into the academic program.
3. The term must have an academic calendar defined in the system.

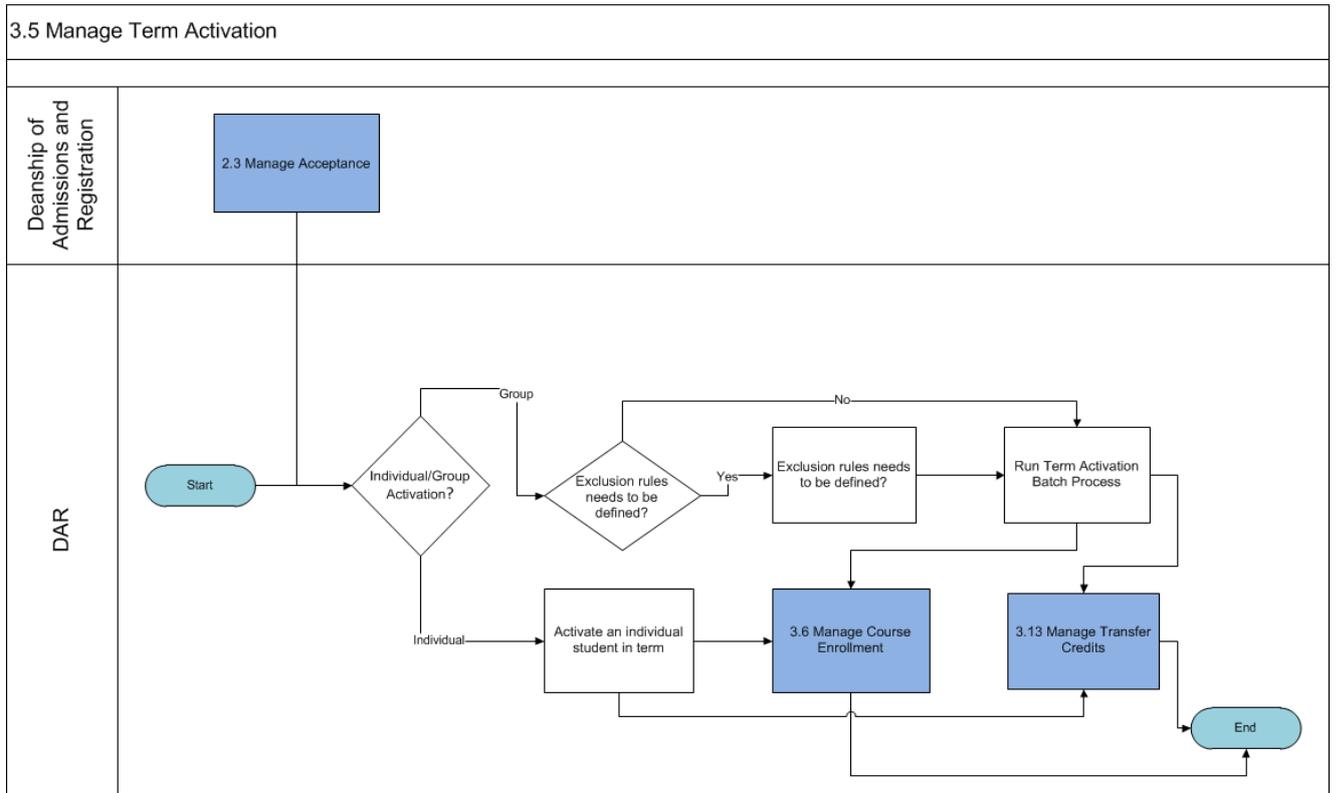
You can activate the students after they have a valid academic program and plan. Term activation is the process by which you inform the system that admitted and matriculated students are eligible for enrollment, transfer credit posting to their records, and tuition calculation. Before each enrollment period, you activate students into terms by one of the following three methods:

1. Use the batch Term Activation process (SRTRMAC.SQR) to activate groups of students into terms with PeopleSoft Process Scheduler, something that you would typically do only once per term.
2. Perform a quick term activation, activating students individually into academic programs and terms, using the Student Program/Plan component and the Term Activation page.

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Business Process Map



Term Activation

Access the Catalog Data page (Records and Enrollment à Student Term Information à Term Activate a Student).

Term Activation	Enrollment Limit	Student Session	Terms in Residence	Term Control Dates	External Study
Zahraa Mohammed AlSadiq		1000005458			
Find View All First 1 of 1 Last					
Academic Career: Undergraduate					
Find View All First 1 of 10 Last					
*Academic Institution:	KSAU	KSA Univ. of Health Sciences			
*Term:	1422	2014 Sprin	Semester	Activation Date:	04/02/1435
Student Career Nbr:	0	Nursing			
Override All Academic Levels:	<input type="checkbox"/>	Academic Year: 2014			
Override Projected Level:	<input type="checkbox"/>	Load Determination: Units			
Academic Level - Projected:	Yr6 Sem1	*Form of Study: Enrollment			
Academic Level - Term Start:	Yr5 Sem2	Academic Load: No Units			
Academic Level - Term End:	Yr6 Sem1	*Billing Career: UGRD			
Level Determination:	Terms	Eligible To Enroll: <input checked="" type="checkbox"/>			

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Following are important terms used to term activate a student that you should need to understand to fully utilized this component:

Academic Career

This field displays all of a student's career term records by academic career.

Academic Institution

The system supplies an academic institution from the User Defaults component. You can specify any valid academic institution here, but you can add a record only if the student is active in an academic program at that academic institution as of the start date of the specified term.

Term

The system displays all active terms for a student. If you are performing a quick activation, enter the term in which to activate the student.

Student Career Nbr (student career number)

By default, the system sets the student career number to zero, which is the first academic program in the student's program stack and identifies the student's primary academic program. The system uses the student career number to perform various calculations, including the calculation of the student's academic level and load. You can override the student career number, for instance, for students in dual programs. After you override the student career number in one term, it rolls from term to term.

Override All Academic Levels

Select to modify all academic level fields on this page. This selection carries over to the next term, so when you add a new row to activate the student in the next term, this check box is selected by default. Also, when you override all academic levels, the system sets all academic levels for the next term to the end of term level for the prior term row. You should select this check box sparingly, because doing so prevents the system from automatically determining the student's academic levels.

If you clear this check box, the system uses the academic level defaults that are established on the Academic Level Table page.

Override Projected Level

Select to modify the student's projected academic level. When you select this check box the Academic Level - Projected field becomes available to edit. If you clear this check box, the system recalculates the academic level projected if the level rule uses units or term progression.

Academic Level - Projected

The system displays the student's projected academic level at the start of the term, which is the student's actual academic level, provided that the student passes all in-progress units from previous terms. The system uses this field for enrollment restriction checking and tuition calculation, among other things.

You can override this field value if you select either the Override Projected Level check box or the Override All Academic Levels check box. You might override a student's projected academic level when you know that your academic institution will be receiving the student's transfer credit, but the credit has not yet been entered into the student's official record. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.

Note:- When a student is activated for a term, either through the batch Term Activation (SRTRMAC.SQR) process or in the Term Activate a Student (STDNT_ACTIVATION)

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component, the Override Projected Level check box is cleared and the Academic Level - Projected field becomes unavailable for edit.

Level Determination

By default, the system displays the level determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row

Load Determination

By default, the system displays the load determination value from the Level/Load Rules Table component, based on the level load rule that is attached to the student's primary academic program for the current career and term row.

Academic Level - Term Start

By default, the system displays the student's academic level at the beginning of the term, based on cumulative completed units from previous terms or transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.

Academic Level - Term End

By default, the system displays the student's academic level at the end of the term, based on cumulative completed units, including work completed in this term and transfer units. You can override this field value if you select the Override All Academic Levels check box. When you override all academic levels, the system sets by default the academic levels for the next term to the value that is in the Academic Level - Term End field for the prior term row.

Academic Year

By default, the system displays the academic year, based upon the term that you enter.

Academic Load

The system displays the student's academic load, which is calculated in units enrolled if the level load rule is set to determine load based on units. Alternatively, the rule could determine load using a default value—assigned on the level load rule itself—or the load could be determined manually.

Form of Study

The system, by default, sets the student's form of study to Enrollment, but you can override this default value. The value of Enrollment tells the system that this form of study is unit-based. You can modify these translate values, with the exception of the Enrollment value.

Eligible To Enroll

The system, by default, selects this check box, which informs the enrollment engine that the student is eligible to enroll in classes for the specified term. Clear this check box to prevent the student from enrolling in classes for the specified term. You might clear this check box when posting transfer credit to a student's career term record in which the student will not be eligible to enroll until a later date. The transfer credit posting process requires that a student is active in the term to which you are posting transfer credit.

Billing Career

The system, by default, sets the student's billing career to the academic career in the student's career term record. The tuition calculation process uses the student's billing career to calculate the student's tuition. If the student is active in more than one academic career in the same term, you might want to consolidate tuition calculation and billing under a single

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academic career. If so, then point the billing career for all of the student's career term records to the same academic career. For example, a student might be enrolled in a term as both a graduate student and an undergraduate student. If you want to consolidate tuition calculation to just the undergraduate career, you would select undergraduate as the billing career for both the student's undergraduate term record and graduate term record.

If you decide to use a single billing career for all of a student's academic careers within a term, note that to perform a term or session withdrawal, the student must be enrolled in at least one class within the academic career that you select as the student's billing career. Otherwise, the term withdrawal and session withdrawal processes halt processing and instruct you to change the student's billing career to an academic career in which the student has enrollments for the term.

Access the Catalog Data page (Records and Enrollment à Student Term Information à Term Activate a Student; Enrollment Limit).

Term Activation	Enrollment Limit	Student Session	Terms In Residence	Term Control Dates	External Study
Zahraa Mohammed AlSadiq		1000005458			
Find View All First 1 of 1 Last					
Academic Career:		Undergraduate			
Find View All First 1 of 10 Last					
Academic Institution:		KSA Univ. of Health Sciences			+ -
Term:		2014 Sprin Semester			
Primary Academic Program:		Nursing			
Academic Group of Advisor:		CON			
*Approved Academic Load:		Full-Time ▾			
Override Unit Limits:		<input type="checkbox"/>			
Max Total Units:		<input type="text"/>	Max Audit Units:		<input type="text"/>
Max No GPA Units:		<input type="text"/>	Max Wait List Units:		<input type="text"/>
Min Total Units:		<input type="text"/>	Max Total Courses:		<input type="text"/>

Approved Academic Load

The system, by default, displays the student's approved academic load for their primary academic program for the term. You can override this value.

The student's approved academic program is set on the Student Program page (Records and Enrollment, Career and Program Information, Student Program/Plan, Student Program).

Override Unit Limits

Select to override the student's term enrollment limits for the approved academic load that you selected. The unit limit fields become available for entry. When processing enrollment requests with this override, the enrollment engine uses the term enrollment limits that you define on this page rather than the ones that are defined on the Enrollment page of the Academic Program Table component. When using this override, the enrollment engine *does not* include the wait list units in the maximum total unit limit. For example, assume that you limit the student to 18 maximum total units, 3 maximum no GPA units, 3 maximum audit units, and 9 maximum wait list units. The student can enroll in a maximum of 18 units for the term. Of these 18 units, the student can take 9 no GPA units (including 3 audit units). In addition to the 18 maximum total units, the student can take an additional 9 wait list units.

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Clear this check box to have the enrollment engine use the term enrollment limits that are set on the Enrollment page of the Academic Program Table component.

Max Total Units (maximum total units)

Enter the maximum number of units that the student can enroll in for the term.

Max Audit Units (maximum audit units)

Enter the maximum number of units that the student can take with an audit-grading basis for the term.

Max No GPA Units (maximum no GPA units)

Enter the maximum number of units that the student can enroll in with a non-GPA-grading basis for the term.

Max Wait List Units (maximum wait list units)

Enter the maximum number of wait list units that the student can have for enrollment for the term.

Min Total Units (minimum total units)

Enter the minimum number of units that the student must enroll in for the term. The enrollment engine references this value only when a student attempts to drop a class or make a units adjustment for a class.

Max Total Courses (maximum total courses)

The system displays by default the maximum number of courses in which a student can enroll for the term according to the value set on the Course Count Limits page.

Access the Catalog Data page (Records and Enrollment à Student Term Information à Term Activate a Student; Student Session).

Term Activation	Enrollment Limit	Student Session	Terms In Residence	Term Control Dates	External Study
Zahraa Mohammed AISadiq		1000005458			
Find View All First 1 of 1 Last					
Academic Career:		Undergraduate			
Find View All First 1 of 10 Last					
Academic Institution:		KSA Univ. of Health Sciences			
Term:		2014 Spring Semester			
Primary Academic Program:		Nursing			
Find View All First 1 of 1 Last					
*Session:	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>			
*Academic Load:	<input type="text" value="N"/>	No Units			
*Form of Study:	<input type="text" value="Enrollment"/>				
Fully Enrolled Date:	<input type="text"/>				
*Approved Academic Load:	<input type="text" value="Full-Time"/>				
Override Billing Units:	<input type="checkbox"/>	Projected Bill Units:		<input type="text"/>	

Session

Select the type of session in which the student will enroll into classes for the specified academic program and term.

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Academic Load

By default, the system displays the student's academic load for the term. You can change the value for an individual session within the term. The system calculates academic load based on the number of units for which the student is enrolled. This field is unavailable for edit if the form of study for the session is Enrollment.

Form of Study

By default, the system displays the same form of study as defined for the term on the Term Activation page of this component. You can change the form of study for sessions that differ from the term value. For example, a student's form of study for the term is Enrollment, but the student is studying abroad for one session of that term. Values are Abroad, Candidacy, Detached, and Enrollment. You can modify these translate values with the exception of the Enrollment value.

By default, the system displays the student's approved academic load according to the value that is set on the Term Enrollment Limits page of the Academic Program Table component. You can override this field for an individual session within the term.

Fully Enrolled Date

The date that the system considers the student fully enrolled for financial aid load calculations and billing purposes. The system, by default, sets the student's fully enrolled date to the corresponding date for the session, as defined in the academic calendar. You can override this date.

If you override the fully enrolled date because the student's account is due a refund, you must recalculate the student's tuition. You can calculate a student's tuition through the Tuition Calculation page in Student Financials.

Approved Academic Load

Enter the student's approved academic load, such as Full-Time or Part-Time.

Override Billing Units

Select if want to calculate the student's tuition bill with criteria other than the number of units in which the student enrolls. If you set billing units as a part of tuition calculation, the system displays the number of the student's projected billing units.

➤ Quick Admit a Student

Following are the detailed execution of steps to quick admit a student:

1. Enter the "**User ID**" into the field. Enter "**KS_DAR**".
2. Enter the "**Password**" into the field. Enter "**123**".
3. Click the "**Records and Enrollment**" link
4. Click the **Quick Admit a Student** link.
5. Enter the "**ID**" into the field. Enter "**1000002363**".
6. Click the "**Academic Career**" to select the academic career from the dropdown list.
7. Click on the "**Undergraduate**" value.
8. Click on the "**Term**" popup to select the student academic term to which you are required to admit this student ID
9. Click on the "**1423**" term value
10. Click the "**Add**" button.
11. Click the "**Program/Plan**" tab.
12. Click the "**Academic Program Primary**" popup to select the required value.
13. Click on the "**BNUR**" program value.
14. Click the "**Campus**" popup to select the required campus value.
15. Click on the "**AA-F**" campus code value.

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16. Click the "**Academic Plan**" popup to select the required program plan value.
17. Click on the "**BNUR**" program plan value.
18. Click the "**Save**" button to save the record of this ID as a admitted student.

➤ Quick Term Activation : Individual

To process a quick activation perform the following steps:

1. Activate the student into an academic program and plan through the Student Program/Plan component by updating the program action code on the Student Program page to ACTV (active). The student must have an active academic program and plan for you to activate the student into a term. Select Records and Enrollment, Career and Program Information, Student Program/Plan.
2. Activate the student into a term through the Term Activation page. Select Records and Enrollment, Student Term Information, Term Activate a Student. When you save the information on this page, you have completed the quick activation process. The student is now ready to enroll in classes for the term.

Following are the in detailed steps to perform the quick term activation. (**Note:-** Click on "See It" Button to view the interactive slideshow of the following steps)

1. Access the application instance
2. Enter the "**User ID**" into the field. Enter "**KS_DAR**".
3. Enter the "**Password**" into the field. Enter "**123**".
4. Click the "**Sign In**" button.
5. Click the "**Records and Enrollment**" link
6. Click the **Quick Admit a Student** link.
7. Enter the "**ID**" into the field. Enter "**1000002363**".
8. Click the "**Academic Career**" to select the academic career from the dropdown list.
9. Click on the "**Undergraduate**" value.
10. Click on the "**Term**" popup to select the student academic term to which you are required to admit this student ID
11. Click on the "**1423**" term value.
12. Click the "**Add**" button.
13. Click the "**Academic Program Primary**" popup to select the required value.
14. Click on the "**BNUR**" program value.
15. Click the "**Campus**" popup to select the required campus value.
16. Click on the "**AA-F**" campus code value.
17. Click the "**Academic Plan**" popup to select the required program plan value.
18. Click on the "**BNUR**" program plan value.
19. Click the "**Save**" button to save the record of this ID as a admitted student.