

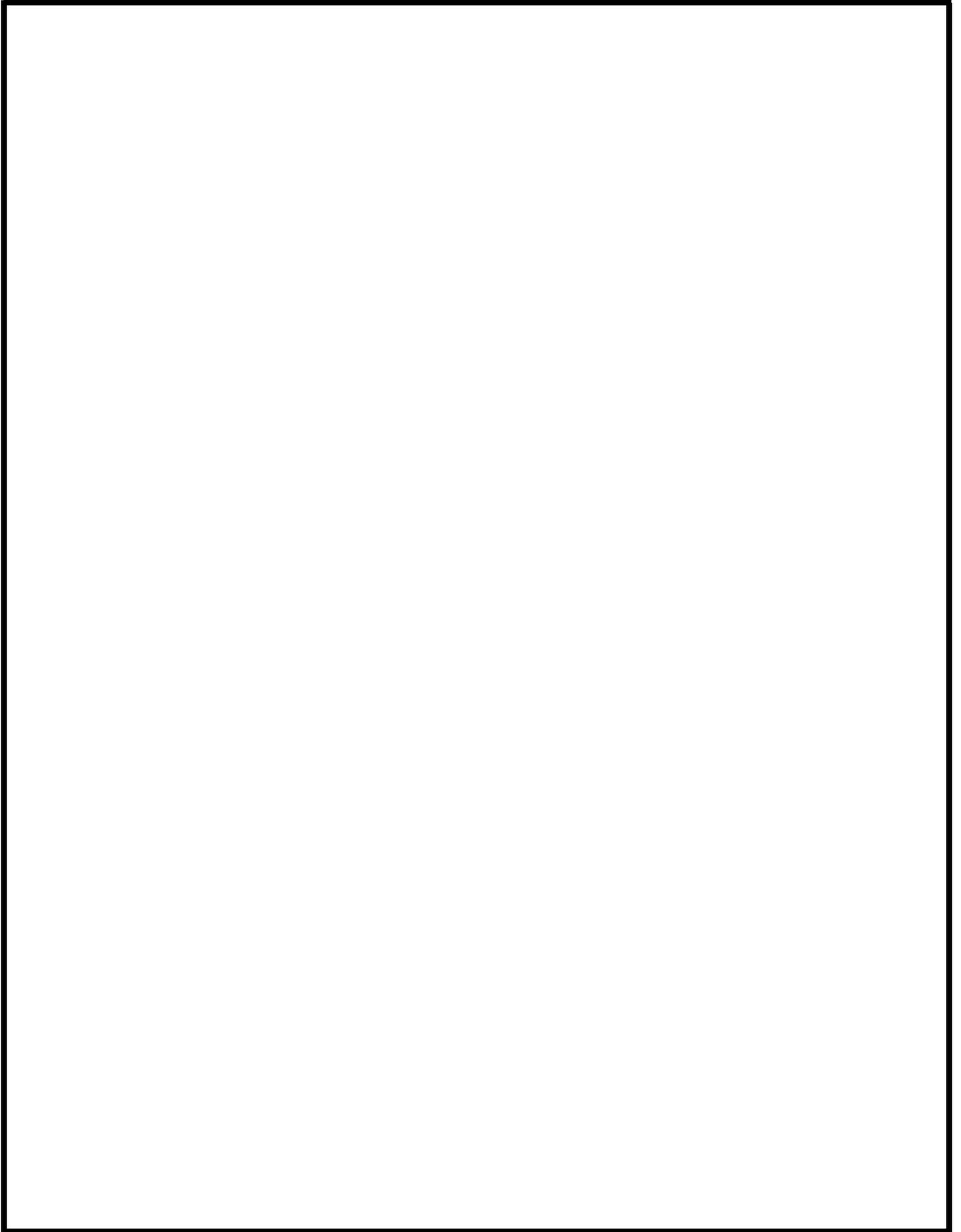
Student System Sample Reports

Reissued Manual as of July 31, 2009

This is a new edition of the *Student System Sample Reports* manual, for Release 18 of Colleague. This edition replaces the previous edition dated February 27, 2009.

The Primary Changes Made

Section	Pages	Changes Made
SuccessDashboards	367—394	Added chapters with information about the new SuccessDashboards for Colleague Student. This section includes a description of each dashboard, samples of the dashboards, and information about the analytics used on the dashboards.
	395—416	Added chapters with information about the new SuccessDashboards for Colleague Financial Aid. This section includes a description of each dashboard, samples of the dashboards, and information about the analytics used on the dashboards.





Ellucian's Colleague Student System Sample Reports

Release 18
July 31, 2009

For corrections and clarifications to this manual, see [AnswerNet page 2614.74](#).



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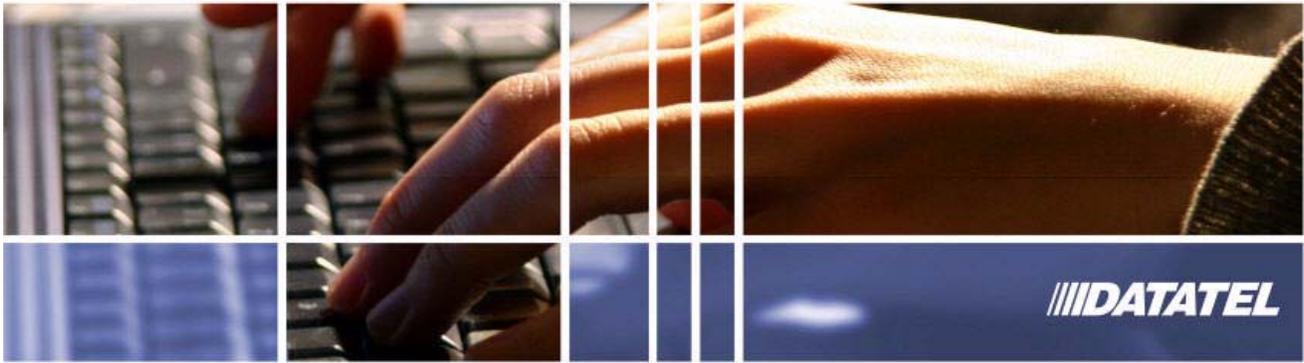
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Student System Sample Reports

Academic Records Reports

Academic Standing/Early Alert (ASEA)

Overview

Use the Academic Standing/Early Alert (ASEA) process to provide a list of students and their associated academic standings for distribution to academic advisors, who will in turn, review/verify each student's standing. This report can also serve as an early alert to the advisors for students with academic difficulties.

You must enter data in the following fields:

- Academic Standing Type
- Primary Sort
- Name/Add Hierarchy

If you do not enter limiting selections from the remainder of the form fields, Colleague uses ALL: all students, all terms, all academic programs, etc.... creating an extremely lengthy report.

Sample Form

ASEA-Academic Standing/Early Alert

Acad Standing Type Term
Primary Sort Start Date
Name/Addr Hierarchy End Date

Saved List Name

Academic Levels Academic Programs
Academic Standings Advisors
Departments Divisions
Schools

Ant Completion Date Students
Federal Cohorts Other Cohorts
Clusters

Start Date End Date

Addr'l Sel Criteria

Sample Report

June 22 1999
17:30

ACADEMIC STANDING/EARLY ALERT

Page 1

Student: Mr. Robert D. Harvey, Jr.

Student Name Sys ID, SS.NO Address Phone	Advisors	Acad Program Class - Rank	Ant Cmpl Dt	Federal Cohorts Other Cohorts Clusters	Start Dt	End Dt	Acad Standing Standing Type Override Reason Dt - Term
Mr. Robert D. Harvey, Jr. 0000887, 215-46-7654 2100 Wilkes Court Apt. 20 Fairfax, VA 22070 703-555-3919	Terry Russell	BA.ACCT					GOOD Academic Term Lev 02/24/99
Mr. Robert D. Harvey, Jr. 0000887, 215-46-7654 2100 Wilkes Court Apt. 20 Fairfax, VA 22070 703-555-3919	Jacob Mallet	BA.ACCT					PROB Academic Term Lev 02/24/99-99/SP

Final Grade Report (FGRP)

Overview

Use the Final Grade Report (FGRP) form to initiate the report of final grades. Select the criteria to define the group of student records Colleague will print.

Sample Form

The screenshot shows the 'FGRP-Final Grade Report' form with the following fields and values:

- Verify Print Restrictions:
- Print Person ID:
- Print SSN:
- Name/Address Hierarchy:
- Mail Rules for Addnl Copies: 1
- Sort Sequence: ZIPNAME By Zip Code By Name
- Print Grading Notes:
- Footer Comments: 1
- Form Image:
- Align Copies:
- Trans Grouping:
- Saved List Name:
- Terms: 1
- Start/End Date:
- Academic Programs: 1
- Academic Levels: 1
- Locations: 1
- Classes: 1
- Students: 1
- Addnl Select Crit: No

Sample Report

Final Grade Report

Person ID: 0000073
 Maria Smiths
 C/O Stuart
 300 College Avenue 110
 Rochester, NY 14624

Advisor: Ms. Jan L. Petersen

Course Section	Title	Grade	Credits	Grade Points	GPA
1. ENGL-102-02	FORMS OF LITERATURE	B	3.00	9.000	3.00
2. ENGL-200-01	MODERN AMERICAN EMGLISH	A	3.00	12.000	4.00
3. MATH-120-04	COLLEGE ALGEBRA AND TRIG.	B	4.00	12.000	3.00
4. MGMT-131-09	MANAGEMENT CONCEPTS		3.00	6.000	2.00
5. ENGL-215-05	CONTEMPORARY SCIENCE FICTION	B	3.00	9.000	3.00
6. ENGL-301-03	SHAKESPEARE I	B	3.00	9.000	3.00

Graduation Audit Report (GDAU)

Overview

Use the Graduation Audit Report (GDAU) form to produce a report of graduates for final review prior to running the Update Academic Credentials File (UACF) process.

This enables you to review a consolidated list of students intending to graduate and verify that each has completed his academic program. It is important the Graduate file be reviewed before running the UACF Process because the Graduates file is deleted during that process.

The Primary Sort field is required and controls the page breaks of the report. You can break by advisor if you want to distribute this report to various advisors for review.

Sample Form

GDAU-Graduation Audit Report

Primary Sort

Name/Address Hierarchy

Saved List Name

Eligible for Commencement

Requirements Complete

Begin End

Commencement Date

Degree Date MM/YR

CCD Date MM/YR

Completion Date

Graduation Term

Academic Levels

Academic Programs Incl

Academic Programs Excl

Commencement Sites

Classes

Reunion Classes

Students

Addnl Selection Criteria

Sample Report

Student System Sample Reports, July 31, 2009
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June 22 1999
5:31

GRADUATION AUDIT REPORT

Page 2

Academic Program: English

Sys ID, SSN Address Phone	Advisors	Acad Program Class--Rank Graduation Honors	Deg/CCD Date Commencement Dt Completion Dt	CUM GPA Cmpl Cred	Elig for Cmc Reqmts Cmpl	Acad Standing Standing Type Date--Term Override Reason
0000271, 122-22-2222 954 Prospect Place Fairfax, VA 22033 708-936-7452	Miss Jackie Hearst	ENGLISH --	05/01/99	2.00 121.00	Y	
0000277 55 Merrifield Dr. Fairfax, VA 22030 703-267-4394	Mr. Richard E. Maxwell	ENGLISH --0001/0003	05/01/99	3.00 125.00	Y	
0000332, 999-80-8987 100 Piccaro Lane Pella, IA 50219	Mr. Ivan Atlov	ENGLISH --	05/01/99	2.35 119.00	Y	
0000343, 767-87-6567 87 Haymarket Street Montgomery, AL 36117		ENGLISH --0001/0009	05/01/99	3.00 123.00	Y	
0000395, 878-78-7878 987 Briarwood Lane Montgomery, AL 36117		ENGLISH --	05/01/99	3.25 122.00	Y	
0000456 14 Kenmore Drive Petersburg, VA 23805		ENGLISH --	05/01/99	3.14 125.00	Y	
0000479 5873 Long Avenue N Chicago, IL 60630		ENGLISH --		3.95 120.00	Y	
0000516 37 Richmond Court Baltimore, MD 21209		ENGLISH --	05/01/99	4.00 123.00	Y	

Mid Term Grade Report (MGRP)

Overview

Use the Mid Term Grade Report (MGRP) form to initiate the report of midterm grades. Select the criteria to define the group of student records Colleague will print.

Sample Form

The screenshot shows the 'MGRP-Mid Term Grade Report' form. It features a blue header bar and a light beige background. The form is divided into two main sections. The top section contains various checkboxes and input fields: 'Verify Print Restrictions' (checked), 'Print Person ID' (checked), 'Print SSN' (checked), 'Name/Address Hierarchy' (checked), 'Mail Rules for Addnl Copies' (1), 'Sort Sequence' (ZIP), 'Print Grading Notes' (checked), 'Footer Comments' (1), 'Form Image' (empty), 'Align Copies' (empty), and 'Trans Group' (empty). The bottom section contains a 'Saved List Name' field, 'Terms' (1), 'Start/End Date' (with calendar icons), 'Academic Programs' (1), 'Academic Levels' (1), 'Locations' (1), 'Classes' (1), 'Students' (1), and 'Addnl Select Crit' (No).

Sample Report

Mid Term Grade Report

Person ID: 0000060
 Mr. Pete Carson
 1334 Fort Stevens Drive
 Portland, OR 97202

Advisor: Mr. Thomas Alva

Course Section Instructor	Title	Credits	Grades						
			1	2	3	4	5	6	
1. ENGL-110-01	BUSINESS COMMUNICATI	3.00	A						
2. MATH-110-01	BUSINESS MATH	3.00			B				
3. MATH-101-00	INTRODUCTORY ALGEBRA	3.00				B			
4. CHEM-101-01	BONDS AND STRUCTURES	4.00		A					
5. HIST-101-01	HISTORY OF WESTERN C	4.00	C						
6. ENG-101-01	ENGLISH COMPOSITION	4.00					B		
7. MGMT-131-01	MANAGEMENT CONCEPTS	3.00						D	
8. BIOL-101-00	PRINCIPLES OF BIOLOG	4.00	A						
9. EDUC-101-05	INTRODUCTION TO EDUC	3.00			C				
10. PSYC-101-00	INTRODUCTION TO PSYC	4.00			B				
11. MGMT-100-00	INTRODUCTION TO MANA	3.00					A		
12. MGMT-104-01	HUMAN RELATIONS AND	3.00	C						
13. MGMT-131-01	MANAGEMENT CONCEPTS	3.00		B					
14. ECON-201-01	MICROECONIMICS	3.00						B	
15. CHEM-101-01	FUNDAMENTALS OF CHEM	4.00						A	
Mr. Ronald J. Warnet									
16. HIST-101-01	HISTORY OF WESTERN C	3.00	B						
Mr. Joseph W. Walt									
17. ENGL-101-01	ENGLISH COMPOSITION	3.00		C					
Ms. Mona Cotulo									
	Cum GPA		2.00	3.00	2.67	3.33	2.67	0.00	
	GPA Cred		14.00	10.00	10.00	10.00	10.00	0.00	
	Att Cred		14.00	10.00	10.00	10.00	10.00	0.00	
	Cmpl Cred		14.00	10.00	10.00	10.00	7.00	0.00	

Missing/Invalid/Exp Grade Rpt (MIEG)

Overview

This report is intended to provide the user with a way to select STUDENT.ACAD.CRED records that have grades missing, invalid grades, or grades whose expiration date has passed. A report is produced reflecting the records found. A second form will be presented allowing you to specify the sort order in which the report will appear.

Sample Form

MIEG-Missing/Invalid/Exp Grade Rpt

Grade Types 1 F Final Gra 2 3

Grade Checks 1 2 3

Final Grade Expire Date

Saved List Name

Start Date End Date

Section Dates

Terms 1

Sections 1 2

Courses 1 2

Instructors 1 2

Grade Schemes 1

Grades Incl 1

Grades Excl 1

Credit Types 1

Additional Selection Criteria

Sample Report

June 28 1999
09:29

MISSING/INVALID/EXP GRADES
01/01/99-05/12/99

Page 1

Student Name	System ID	SSN	Advisor	Course	Section	Term	Grd Grade	Expire Type	Verified Date	Verified Operator	Verified Date
Cooke, Geoffrey D.	0000192	218-74-4504	J. Petersen	HIST-101	01	99/SP	F				
							V				
Cooke, Geoffrey D.	0000192	218-74-4504	J. Petersen	MATH-101	01	99/SP	F				
							V				
Dillard, Carl E.	0000095	999-99-9999	R. Maxwell S. Obrien Dr. James Baker	ECON-246	01	99/SP	F				
							V				
Elroy, David	0000003	213-450-091	B. Franklin	ART-1002	01	99/SP	F				
							V				
Nelson, Eric T.	0000078	125-35-1254	S. James	MGMT-660	02	99/SP	F				
							V				
Nelson, Eric T.	0000078	125-35-1254	S. James	MGMT-231	30	99/SP	F				
							V				
Nelson, Eric T.	0000078	125-35-1254	S. James	MGMT-232	31	99/SP	F				
							V				
Nelson, Eric T.	0000078	125-35-1254	S. James	ENGL-101	01	99/SP	F				
							V				
Nelson, Eric T.	0000078	125-35-1254	S. James	ENGL-102	02	99/SP	F				
							V				
Williams, Elena	0000345	767-87-6543	S. James	ENGL-101	03	99/SP	F				
							V				

Student Schedule Print (SCHD)

Overview

Use the Student Schedule Print (SCHD) process to select students and print their respective course schedules.

The primary file Colleague uses is the STUDENTS file.

Sample Form

SCHD-Student Schedule Print

Name/Addr Hierarchy Print Sort Order ▼

Print Waitlisted Incl Printed Comments

Break on Term

Footer Text

Saved List Name

Start/End Date

Terms 1

Reporting Terms 1

Students 1

Acad Programs 1

Acad Levels 1

Locations 1

Acad Cred Status Incl 1

Acad Cred Status Excl 1

Mail Rules for Addnl Copies 1

Addnl Selection Criteria

Sample Report

10:12:20 06-23-99

Student Schedule Page 5

Mr. Minispring-One Davis
 Academic Program(s) : None

Residency.....: None

Ant

Degree.....:

Advisor:
 Cmpl Date.....:
 Office.:

Ant

Course					Inst					
Credits	CRS									
Instructor	Days	Meeting Times	Location	Bldg/Room	Meth	Start Date	Term	CEUs	Stat	
GXDS-99/SP-M1	TTH	10:00AM 11:55A	MAIN	CARV ABT	LEC	99/01/20	99SP1	3.00cr	New	
Gxd's 99/SP Course										

Total Credits: 3.00
 Total CEUs : 0.00

Scanner Grade Request Roster (SGRR)

Overview

Use the Scanner Grade Request Roster (SGRR) form to print the Request for Grade rosters on scanner forms. You can distribute these forms to the appropriate instructors so they can record final grades for students in their course sections. You can request these manually recorded grades to be returned to your central office by a certain date to be scanned into the Colleague database.

The SGRR form is divided into two parts:

- Report parameters
- Selection criteria

The report parameters are options from which you can choose that indicate the way the report can be printed. These parameters include:

- Whether to include withdrawn or dropped students on the roster
- Whether to include or exclude students with various anticipated completion dates
- Whether to include or exclude students with various class levels from the roster
- The date grades must be returned

The selection criteria for the Scanner Grade Roster (SGRR) includes the option of entering a saved list of records from the COURSE.SECTIONS file. You can further limit this selection by using various criteria.



Note: When running the scanner grade report, you can choose to include any of the existing grades (midterm 1 through 6 or final) in the report. When running the scanner grade input, make sure you run it for the appropriate grade.

Sample Form

SGRR-Scanner Grade Request Roster

Incl Dropped	<input type="checkbox"/>	Incl Class Lvl	<input type="text" value="1"/>
Incl Withdrawn	<input type="checkbox"/>	Excl Class Lvl	<input type="text" value="1"/>
Incl Ant Comp Dt	<input type="text"/>	Grade Request Dt	<input type="text"/>
Excl Ant Comp Dt	<input type="text"/>	Mid/Final Grades	<input type="text"/>

Saved List Name	<input type="text"/>
Course Sections	<input type="text" value="1"/>
Start Dates	<input type="text"/>
End Dates	<input type="text"/>
Terms	<input type="text" value="1"/>
Incl Locations	<input type="text" value="1"/>
Excl Locations	<input type="text" value="1"/>
Incl Subjects	<input type="text" value="1"/>
Excl Subjects	<input type="text" value="1"/>
Incl Departments	<input type="text" value="1"/>
Excl Departments	<input type="text" value="1"/>
Faculty	<input type="text" value="1"/>
Schedule Type	<input type="text" value="1"/>

Additional Selection Criteria **No**

Sample Report

Jun 22 99

99/SP RELIG 101 01

0000698

Mr. Thomas Alva

Basic Principles Of Chr

RELIG 101 01

NSLC Verification Report (SITE)

Overview

Use the NSLC Verification Report (SITE) process to verify that all the information generated by the NSLC Student Data Extraction (SITX) process is valid before submitting the information to the National Student Loan Clearinghouse (NSLC).

The verification process verifies the term dates against the reporting period dates entered on the NSLC Parameter Definition (SITS) form.

The verification report processes the entire LR.STD.ENR file and updates the status of the generated information. The information must have a Verified status before you can transfer the information to tape. If the verification process detects any incorrect information, the report will list the errors for each incorrect student record. Use the NSLC Data Correction (SITC) form to correct the errors for each record.

The Status of the extracted information must be either Generated or Modified before you can verify the information using the SITE process. If you try running the SITE process with an incorrect status, the following message is displayed:

```
Cannot verify - Status must be Generated or  
Modified
```

Sample Form

SITE-NSC Verification Report

Status: Generated by TJH on 01/29/09 at 04:37PM

Proceed with the verification report

Sample Report

June 24 1999
16:31

National Student Loan Clearinghouse Verification Rpt

Page 1

Student	Error conditions
----- 0018411 Chatterjee, Larry	----- The Social Security Number is missing.
0018691 Davis, Michelle	The Social Security Number is missing. Student's City is missing. Student's State is missing.
0018693 Davis, Gracey	The Social Security Number is missing. Street line 1 is missing. Student's City is missing. Student's State is missing.
0018699 Dug, Jack Russel	The Social Security Number is missing. Street line 1 is missing. Student's City is missing. Student's State is missing.

Students ID Cards (STID)

Overview

Use the Students ID Cards (STID) process to produce ID cards for various campus organizations.



Note: This report prints alignment labels.

Sample Form

STID-Students ID Cards

Form Name

Name/Address Hierarchy

Print Class

Valid For Term

Valid From Date 

Valid To Date 

Saved List Name

Student IDs 

Acad Levels 

Terms 

Home Locations 

Discounts 

Restriction Excl 

Additional Selection Criteria

Sample Report

0002484
029-19-3821
Sally K. Anndale
FR

0001644
754-89-3265
Fredrick Barret
SR

0005687
546-89-1257
Rachael D'Angelo
SO

0004879
698-13-5427
Kimberly Evans
JR

0001379
738-21-2018
Janet Franks
SR

0002972
240-03-2164
Megan Glassey
FR

0003975
038-65-3978
Richard Jung
SO

0004630
264-52-7930
Harry Matteo
JR

Student Labels (STLA)

Overview

Use the Student Labels (STLA) process to generate labels for your students. The format for these labels is stored in a Communications Control Forms Processing record (STUDENT.LABELS).

The STLA process allows you to specify criteria and uses that information in conjunction with the form layout to select from the STUDENTS file, creates a workfile for fields that must be sorted but are not accessible from those files (For example, zip code) and generates labels in the format specified.



Note: If you do not specify any limiting criteria, Colleague selects the entire STUDENT file for label printing.

The STLA process also sorts and creates a report for postal sorting if a postal sort code is entered and selects addresses according to specifications, including:

- Address hierarchy
- Mail rules to include or exclude
- Joint or individual mail

If an activity is specified, it will be updated with the number of pieces and the form ID. If history is to be updated, the mailing history file is updated with the form ID and the date mailed.



Note: This report prints alignment labels.

Sample Form

STLA-Student Labels

Form Name **STU.LABELS Student Labels Form**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End	
Enroll Date	<input type="text"/>	<input type="text"/>	
Zip	<input type="text"/>	<input type="text"/>	
Acad Levels	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>
Acad Programs	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>
Student Types	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>
Enr Statuses	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>
Home Locations	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>
			Classes <input type="text" value="1"/>
			Start Terms <input type="text" value="1"/>
			Zips <input type="text" value="1"/>

Additional Selection Criteria

Sample Report

0015687

Miss Terry Appleby
33 Minuet Drive
Annandale VA 22066

0025489

Mr. Jack Carmen
9933 Main Street
Richmond VA 54463

0010220

Miss Nancy Settle
56 Cunningham Dr.
Fairfax VA 22033

0005465

Mr. James R. Thompson
876 High Drive
Richmond VA 54463

0010274

Miss Tina Tussle
35 Mistvalley Road
Annandale VA 22066

0010221

Mr. Tim Wheeley
51 Sunset Drive
Annandale VA 22066

0001220

Miss Katie Brighten
31 Action Street
Ashburn VA 22011

0054876

Miss Jackie Niess
1456 Noble Road
Annapolis MD 22409

0010222

Mr. Jeffrey Snodgrass
88 Nogmon Court
Fairfax VA 22033

0026987

Mr. Kyle Tomple
9808 Marilyn Road
Annandale VA 22066

0087549

Mr. Jon Ubler
3354 Sixth Street
Fairfax VA 22033

0010223

Mr. Tom A. White
1260 Buck Trail Rd
Allentown PA 18104-2037

0017348

Mr. Ryan Brown
P.O. Box 557
Reading PA 78956

0015688

Mr. Gus Nubkin
11 Nevermore Road
Annandale VA 22066

0055487

Miss Janet Snyder
786 Manor Court
Herndon VA 20170

0028798

Mr. John Trent
9 Pinos Street
Ashburn VA 22011

0198754

Miss Kelly Vasser
98 Degrees Drive
Herndon VA 20170

0025487

Mr. Kirk Wyler, III
975 Teter Blvd
Allentown PA 18104

Transcript Print (TRAN)

Overview

Use the Transcript Print (TRAN) process to select students and print their respective transcripts.

The primary file Colleague uses is the STUDENTS file.

You can select how each printing is sorted from the following options:

- By student
- By postal zip code and then by student
- By any STUDENTS field

If you enter a saved list, Colleague assumes you have pre-sorted your list and does not re-sort the records before printing.

Sample Form

TRAN-Transcript Print

Trans Grouping Recipient

Use Grouping Ptr Sort Order

Verify Prt Restrs Add Hierarchy

Saved List Name

Students

Acad Programs Incl

Acad Programs Excl

Academic Levels

Home Locations Incl

Home Locations Excl

Departments Incl

Departments Excl

Divisions

Schools

Class Levels

Advisors

Acad Level Standing

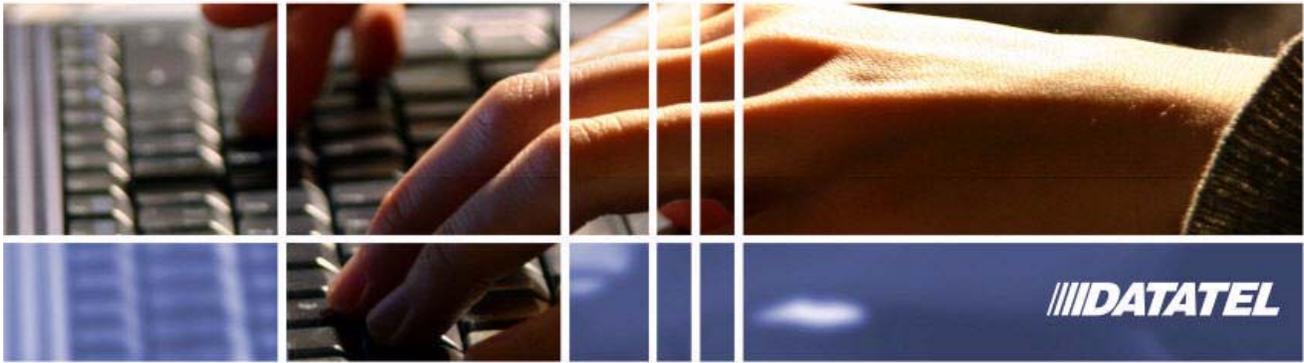
Addnl Select Criteria

Sample Report

07/07/99		Undergraduate Level			Page 1 of 1	
Kathie Bells 1 Main Street Bridgeport CT 06611		ID Number: 0001573 SSN: 565-98-7219 Birth Date: 11/08/76 Birth Name: Kathryn Ann Bells				
Course	Title	Grd R	Hrs Att	Hrs Cmpt	Grade Points	Course Dates
HIST 365	History of Incas	B	3.00	3.00	3.0000	08/28/99-12/31-99
	Term 1999/FA (G)	Totals:	3.00	3.00	3.0000	GPA = 3.0000
	Cumulative Totals:		3.00	3.00	3.0000	GPA = 3.0000
ENGL 101	English Comp	A	3.00	3.00	3.0000	01/01/99-05/01/99
			1.00	1.00	1.0000	01/01/99-05/01/99
	Non Term Totals:		4.00	4.00	4.0000	GPA = 3.2000
DRAMA 101	Art of the Theater	B	3.00	3.00	3.0000	09/01/99-12/15/99
	Term 1999/FA	Totals:	3.00	3.00	3.0000	GPA = 3.0000
	Cumulative Totals:		7.00	7.00	7.0000	GPA = 3.1000
HIST 200	History of England	B	3.00	3.00	3.0000	08/28/99-12/31/99
HIST 342	American Social H	C	3.00	3.00	3.0000	08/28/99-12/31/99
	Term 1999/FA	Totals:	6.00	6.00	6.0000	GPA = 2.8900
	Cumulative Totals:		13.00	13.00	13.0000	GPA = 2.9600
TOTALS: CRED.ATT = 13.00 CRED.CPT = 13.00 GRADE.PTS = 13.0000 GPA = 2.9600						

* AA- Assoc of Arts Degree Awarded on 05/99 *						
* Majors			Minors		Specializations *	
* ----- *						
* ACCT- Accounting *						

* Official copy must bear signature and impression seal. *						



Student System Sample Reports

Accounts Receivable Reports

Account Analysis by AR Code (ACCA)

Overview

Use the Account Analysis by AR Code (ACCA) form to generate a report by AR code that lists each invoice in the selected group that includes the selected AR code. For example, if you ran this report for your tuition AR code and ran the detailed report, Colleague would provide a list of all invoices in the designated time frame that included the tuition AR code.

You identify the records that Colleague uses in the report through a saved list of IDs from the AR.INVOICE.ITEMS file, through the selection options on the ACCA form, or through a combination of these options. In addition, you identify whether you want a summary or detail report and the range of invoice dates.

Sample Form

ACCA:Account Analysis by AR Code

Start Date 
Cutoff Date 

Summary/Detail

Saved List Name

AR Codes

AR Types

Additional Selection Criteria

Sample Report

June 24 1999
15:10

ACCOUNT ANALYSIS BY AR CODE

Page 1

AR Code: APPN Application Fee

AR Type	Date	Account Number	Account Holder Name	Invoice Number	Description	Amount
01	09/28/99	0018324	Davis, James Robert	000002170	Application Fee	25.00
01	09/28/99	0018288	Evans, William	000002149	Application Fee	25.00
01	09/28/99	0018289	Franks, Maria	000002150	Application Fee	25.00
01	10/19/99	0018326	Miller, Shannon	000002176	Application Fee	25.00
01	10/15/99	0018349	Omar, Nicklaus	000002227	Application Fee	25.00
01	04/20/00	0018830	Perkson, Holly	000002970	Application Fee	25.00
01	06/22/00	0018945	Rockford, Joeseeph	000006418	Application Fee	25.00
01	06/23/00	0018948	Wisdo, Valerie	000007171	Application Fee	25.00
01	06/23/00	0018948	Zeeny, Patricia	000007172	Application Fee	25.00
						=====
AR Type Total						225.00
04	04/09/99	0001159	Avery, Johnathan	000001467	Health Fee	25.00
04	04/25/99	0001159	Elle, Bernard	000001468	Health Fee	25.00
						=====
AR Type Total						50.00
AR Code Total						275.00
Grand Total						275.00

Accounts Receivable Reports: Account Analysis by AR Code (ACCA)

Aged AR Balance Report (AGBL)

Overview

Use the Aged AR Balance Report (AGBL) to obtain a report of AR accounts by up to four different aging groups. When you run this report you define the age ranges you want for the first three groups. The fourth group is for all balances greater than 90 days old. This report lists each selected account and provides the following information about the account:

- current charge and credit balances
- amount of unallocated payments
- balance in each of the four age brackets

In addition to selecting the age brackets that you want to report on, you choose the AR types and, optionally, the specific AR.ACCTS records that Colleague selects for the report (you select specific records either as a saved list of IDs from the AR.ACCTS file or by using the additional selection criteria option).

There are two aging methods available for calculating the aged balance. The Specific Method takes into account allocated payments. The Chronological Method ignores payment allocations. It adds up all invoices into the appropriate aging group, then applies payments to the oldest group first rolling any credit balance rolled forward to the next to oldest group, and so on.



Note: Negative payments will be treated by the Chronological Aging method in the same manner as positive payments and will be applied the oldest aging group first, regardless of when the negative payment was made.

Sample Form

AGBL-Aged AR Balance Report

	Days	Description
Max Age of Group 1	30	(0 to 30 Days)
Max Age of Group 2	60	(31 to 60 Days)
Max Age of Group 3	90	(61 to 90 Days)
Group 4		(More than 90 Days)

Cutoff Date: 02/25/09

Aging Method: C Chronological

Aging Basis: D Invoice Due Date

Terms to Process

1	
2	
3	

Saved List Name: _____

AR Types

1	
2	
3	

Addtl Sel Criteria: No

Sample Report

June 24 1999 15:20		AGED AR BALANCE RPT-CHRONOLOG 02 Employees Receivable Cutoff Date: 06/24/99 Aging Method: Chronological				Page 1	
Account Number	Account Name	Charge Balance	Credit Balance	0 to 30 Days	31 to 60 Days	61 to 90 Days	More Than 91 Days
-							
0001321	Davis, Johnathan	200.00					200.00
0018412	Derby, Jake	100.00					100.00
0018941	Evans, Barry	10.00		10.00			
0017121	Franks, Carrie		321.00	321.00-			
0017123	Garret, Mary	210.00					210.00
0018694	Ghast, Harry	30.00					30.00
0018204	Glassey, Melissa	561.00					561.00
0018684	Goldmann, James	30.00					30.00
0018440	Gradey, Russ	611.00					611.00
0018680	Henderson, Robert	1,059.74					1,059.74
0018679	Hendrickson, Heather	1,554.56					1,554.56
0018091	Hill, Bobby	1,337.00					1,337.00
0018487	Kingston, Megan	405.00					405.00
0018007	Lilly, Joanne		982.00	982.00-			
0017984	MacElroy, Jamie		382.00	382.00-			
0018044	Nelson, Matthew	776.00					776.00
0017161	Omar, Joseph	100.00					100.00
0018495	Oneely, Jacob	405.00					405.00
0018496	Patton, John	405.00					405.00
0001316	Perkson, Patty	2.00					2.00
0018014	Polster, Nikki		3,000.00	3,000.00-			
0018202	Pulk, Henry	1,237.00					1,237.00
0018683	Stewart, Jane M.	1,003.12					1,003.12
0018444	Stryker, Brian R.	686.00					686.00
0018027	Sutor, Kyle		588.00	588.00-			
0018362	Swartz, Marissa	230.00					230.00
0018365	Totts, Edward	821.00					821.00
0018363	Travis, Kelly	821.00					821.00
0000655	Tsar, Miranda		540.39	540.39-			
-							
		12,594.42	5,813.39	5,803.39-	0.00	0.00	12,584.42

Sample Report (con't)

June 24 1999 15:20		AGED AR BALANCE RPT-CHRONOLOG GRAND TOTALS					Page 2	
		Cutoff Date: 06/24/99			Aging Method: Chronological			
Account Number	Account Name	Charge Balance	Credit Balance	0 to 30 Days	31 to 60 Days	61 to 90 Days	More Than 91 Days	
-		12,594.42	5,813.39	5,803.39-	0.00	0.00	12,584.42	
Grand Total:	6,781.03							

AR Batch Reconciliation (ARBR)

Overview

Use the AR Batch Reconciliation Report (ARBR) to generate a listing of all invoices in selected invoice batches. Use this report to review the invoice entries prior to reconciling individual invoice batches.

You can choose which invoice batches you want included in the report by using a saved list of records from the AR.INVOICE.BATCHES file, by using the selection options on the ARBR form, or with a combination of these options.

Use the Invoice Batch Control (INVB) form to reconcile batches by changing their status to "R."

Sample Form

ARBR-AR Batch Reconciliation

Invoice Summary **Yes**

Invoice Sort

Saved List Name

Locations

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>

Batches

1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>

Additional Selection Criteria **No**

Sample Report

Jun 29 1999
11:23

AR BATCH RECONCILIATION RPT

Page 5

Batch Number.....: 504
 Location.....: Main Campus
 Expected Amount.....: 2520.00
 Expected Number of Items: 4

Invoice Number	AR Type	Account Number	Inv Date	Extended Amount	Tax Amount	Total
000000783	STREC	0000938	05/13/99	100.00	5.00	105.00
Bookstore Charges		Glassey, Megan	05/13/99			
000000784	STREC	1000274	05/13/99	100.00	5.00	105.00
Book Store Charges		Gray, Jonathan F	05/13/99			
000000785	STREC	1000285	05/13/99	200.00	10.00	210.00
Bookstore Charges		Peters, Eileen	05/13/99			
000000930	STREC	1037146	05/13/99	2000.00	100.00	2100.00
Bookstore Charges		Smith, Stacy A.	05/13/99			
Batch Total:				2400.00	120.00	2520.00

Items: 4

AR Type	Amount
-----	-----
STREC	2520.00

Tax Code	Amount
-----	-----
M1	120.00

AR Labels (ARLA)

Overview

Use the AR Labels (ARLA) form to generate mailing labels for accounts receivable account holders. You can use either a saved list of IDs from the AR.ACCTS file or the specific selection options on the ARLA form to select which applicants Colleague will generate mailing labels for.

The mailing labels use a standard format, defined as the AR.LABELS form, that you can modify if this format does not meet your needs. You can modify this format in one of two ways: you can change the AR.LABELS format so that each time you run these labels the new format is used, or you can create a custom format that you specifically select whenever you need to use a variation of the default.

For example, the default format is a 3-up style label. If you always print your mailing labels as 2-up labels, change the AR.LABELS format so that the labels always print in that style. If you typically use the 3-up format but occasionally want to use the 2-up labels, you can create a custom form that you would substitute at the time of printing (by entering the form name in the Form field on the ARLA form) each time you generate the labels.

You can modify this format by using the Forms Processing forms in the Core application.

Specifying Sort Definition

After you complete this form, the Sort Definition form is displayed. Use the Sort Definition form to specify the sorting criteria and sort sequence.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.



Note: This report prints alignment labels.

Sample Form

ARLA-AR Labels

Form Name **AR.LABELS AR Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection

Saved List Name

Begin End

Zip

AR Balance

AR Types

Academic Levels

Locations

Zips

Additional Selection Criteria

Sample Report

s

0000265
Mr Charles Shields
3200 Broadway
Kansas City, MO 13342

0000197
Ms Tracy Ebert
978 Malcolm Ln
Fairfax, VA 22033

0018297
Mr Brad Hamilton
4410 Lees Corner Rd
Chantilly, VA 22021

0016425
Mr Philip Bailey
987 Fountain Av
Fairfax, VA 22115

0000543
Mr Sean Harris
841 New Haven Rd
Newark, NJ 07003

0032518
Mr Casey McMichael
4789 Leesville Rd
Shelby, OH 45502

0042078
Ms Katie Lamberti
2280 Heather Ct
Bethsada, MD 20777

0000873
Mrs Ellen Dunlap
602 Deers Creek Road
Great Falls, VA 22033

0000260
Ms Dia Frierson
432 Main Street
Fairfax, VA 22033

0000189
Mr Scott Hanson
4567 Fern Ct
Alexandria, VA 22031

0034560
Ms Casey Atkins
45 Wax Mill Rd
Vienna, VA 22180

0007823
Ms Shannon Valenti
896 North Rd
Henniker, NH 03242

0000444
Mr Dan Paul
4314 Linwood Ct
Blasdell, NY 14219

0007365
Ms Donna Jones
1317 Emerson St NW
Washington DC 20011

0000074
Ms Kristen Kerry
1234 Sunrise Dr
Oakton, VA 22131

0018247
Ms Amanda Davis
4375 Calvart Cliffs Rd
Centreville, VA 22020

0018324
Ms Lorraine Matthews
1801 Foxhall Rd
Reston, VA 22054

0012563
Ms Mary Wilson
300 Main Street
Norton, MA 02766

0014526
Mr Jeff Billings
999 Crestwood Dr
Manassas, VA 22110

0000990
Mr Jake Powell
800 Allegany Rd
Pittsburgh, PA 15233

0001842
Mr Ben Bobb
7654 Beach Down Dr
Lusby, MD 20925

Statement Print (ARSP)

Overview

Use the Statement Print (ARSP) form to generate a printed summary of an individual's or group of individuals accounts receivable accounts. The statement print processes all of the accounts receivable information for the selected individuals. Use the Registration Print (RGST) form to generate statements that reflect an individual's registration activity. Use the invoice print process (from the Invoice Print [INVP] form) to print the details of a single transaction.

When you print a statement for an individual who has a balance in more than one AR type for the selected time period, Colleague generates a separate statement for each AR type.

You have a number of options for generating statements, including account aging and a summary or detail option. You select the accounts you want statements for by using a saved list of IDs from the AR.ACCTS file, the selection options on the ARSP form, or a combination of the two.

Sample Form

ARSP-Statement Print

Start Date	<input type="text" value="02/25/09"/>	Age Balance	<input type="text" value="No"/>
Statement Date	<input type="text" value="02/25/09"/>	Days Description	
Summary Level	Summary	Deferred Group Title	Deferred
Show Pending FA	N	Days Current	30
Remittance Slip		Max Age of Group 1	60
Sort Sequence	ZIP	Max Age of Group 2	90
		Group 3 Title	> 90 Days

Mail Rules for Addnl Copies:

Saved List Name:

Name/Addr Hierarchy:

AR Types:

AR Accountholders:

Message:

Additional Selection Criteria:

Sample Summary Report

Datatel University
 4375 Fair Lakes Court
 Fairfax VA 22033

Statement of Account
 Student Receivable

Account Holder 0000551
 Mr. Martin Abegg

Statement Date
 06/29/99

Mr. Martin Abegg
 179 River Road
 Parkersburg, WV 25704

Date	Number	Code	Description	Charges	Credits
01/15/99			*** Balance Forward ***	1,520.78	0.00
05/01/99	000000553		AR Paymnt/Thank You		500.00
05/13/99	000006928		Finance Charge	111.51	
				=====	=====
Total:				1,632.29	500.00

Statement Balance: 1,132.29

Sample Detail Report

Datatel University
4375 Fair Lakes Court
Fairfax VA 22033

Statement of Account
Student Receivable

Account Holder 0000551
Mr. Martin Abegg

Statement Date
06/29/99

Mr. Martin Abegg
179 River Road
Parkersburg, WV 25704

Date	Number	Code	Description	Charges	Credits
01/15/99			*** Balance Forward ***	1,520.78	0.00
05/01/99	000000553		AR Paymnt/Thank You		500.00
05/13/99	000006928		Financial Charge		
		FIN	Financial Charge	111.51	
				=====	=====
			Total:	1,632.29	500.00

Accounts Receivable Trial Balance (ARTB)

Overview

Use the Accounts Receivable Trial Balance (ARTB) form to generate a record of an account holder's AR account. The process can generate one of four different reports. The report contains details of all account activity that has occurred between the selected start date and cutoff date, or produces summary reports for the accounts or AR.TYPES. You can select accounts for which you want to generate the trial balance through a saved lists of IDs from the AR.ACCTS file, through the selection options on the ARTB form, or through the combination of selection options.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.

Sample Form

ARTB-AR Trial Balance

Start Date

Cutoff Date

Print Zero Balance

Detail Level

Detail Type

Saved List Name

AR Types

1	<input type="text" value=""/>
2	<input type="text" value=""/>
3	<input type="text" value=""/>
4	<input type="text" value=""/>
5	<input type="text" value=""/>

Account Holders

1	<input type="text" value=""/>
2	<input type="text" value=""/>
3	<input type="text" value=""/>
4	<input type="text" value=""/>
5	<input type="text" value=""/>

Additional Selection Criteria No

Sample Summary Report

Acct Holder/ Trans. No.		Acct Holder Name/ Code	Transaction Description	Date	Balance Forward	Charges	Credits	Balance
1092916			Adams, Angela	06/08/2003	150.00			150.00
Account Total:					150.00			150.00
1092728			Anderson, John	06/08/2003	118.50			118.50
Account Total:					118.50			118.50
1092716			Carmichael, Melissa	06/08/2003	118.50			118.50
Account Total:					118.50			118.50
1092647			Froggatt, James	06/08/2003	99.00			99.00
Account Total:					99.00			99.00
1092646			Niedermeyer, Robert	06/08/2003	99.00			99.00
Account Total:					99.00			99.00

Sample Detail Report

June 09 2003 13:02		Accounts Receivable Trial Balance - Summary by Account From 06/08/2003 to 06/09/2003 AR Type : 01 Student Receivables General Ledger Account: 10-0000-13020-01			Page 1
Acct Holder	Acct Holder Name	Balance Forward	Charges	Credits	Balance
1092916	Adams, Angela	150.00			150.00
1092728	Anderson, John	118.50			118.50
1092716	Carmichael, Melissa	118.50			118.50
1092647	Froggatt, James	99.00			99.00
1092646	Niedermeyer, Robert	99.00			99.00

Payment Plan Coupon (PPCP)

Overview

Use the Payment Plan Coupon (PPCP) form to generate coupons for one or more payment plans. Colleague generates one payment plan coupon for each scheduled payment for selected payment plans.

You can select the payment plans for which you want to generate coupons by using a saved list of IDs from the AR.PAY.PLANS file, the selection options on the PPLN form, or a combination of these selection options.

Colleague only processes current plans. Plans that have been canceled or paid in full are not processed. For each plan, a coupon is printed for each scheduled payment with an outstanding balance.

Sample Form

PPCP-Payment Plan Coupon

Name/Address Hierarchy **AR**

Sort Sequence ZIP Zip Code

Message Line

Saved List Name

Start/End Date

Terms

1	
2	
3	

Person/Organization

1	
2	
3	

AR Type

1	
2	
3	

Additional Selection Criteria **No**

Sample Report

Payment Plan Coupon

Account

Holder: 0003704

Mr. Donald Davis

Mr. Donald Davis

Payment Plan...: 6

Payment Number: 1

Due Date.....: 12/10/99

Amount Due.....: 94.00

Payment Plan Statement (PPST)

Overview

Use the Payment Plan Statement (PPST) form to obtain a printed record of a student's payment plan. Use the statements generated from this process as a means of requesting payment from the student.

You choose which payments you want to generate statements for by entering a saved list of IDs from the AR.PAY.PLANS file, by using the selection options on the PPST form, or by using a combination of both. You can also choose how to sort the statements and whether you want only past due payment plans.

Sample Form

The screenshot shows a web-based form titled "PPST-Payment Plan Statement". The form has a blue header bar. Below the header, there are several input fields and buttons:

- Print Past Due Only:** A radio button labeled "Yes" is selected.
- Name/Address Hierarchy:** A dropdown menu is set to "AR".
- Sort Sequence:** A dropdown menu is set to "ZIP Zip Code".
- Mail Rules for Addnl Copies:** A dropdown menu is set to "1".
- Message Line:** A large empty text input field.
- Saved List Name:** A text input field.
- Start/End Date:** Two date pickers.
- Terms:** A list of two dropdown menus, both set to "1".
- Person/Organization:** A list of two dropdown menus, both set to "1".
- AR Type:** A list of two dropdown menus, both set to "1".
- Additional Selection Criteria:** A radio button labeled "No" is selected.

Sample Report

0000135
 4375 Fair Lakes Court
 Fairfax VA 22033

PAYMENT PLAN STATEMENT

AR Type.....: Student Receivable
 Plan Amount...: 970.45 Frequency.....: Monthly
 Set Up Charges: 12.50 Number of Payments: 10
 Total.....: 982.95 Down Payment Due...: 01/10/99
 Down Payment...: 109.55 1st Sched Pay Date: 01/11/99

Due Date	Amount Due	Date Paid	Past Due	Late Charge	Amount Paid	Balance
01/10/99	109.55	02/24/99	Yes	12.47	0.00	982.95
01/11/99	87.00	02/24/99	Yes	20.66	0.00	982.95
02/11/99	87.00	02/24/99	Yes	20.32	0.00	982.95
03/11/99	87.00	02/24/99	No	0.00	86.73	896.22
04/11/99	87.00	02/24/99	No	0.00	87.00	809.22
05/11/99	87.00	02/24/99	No	0.00	87.00	722.22
06/11/99	87.00	02/24/99	No	0.00	87.00	635.22
07/11/99	87.00	02/24/99	No	0.00	87.00	548.22
08/11/99	87.00	02/24/99	No	0.00	87.00	461.22
09/11/99	87.00	02/24/99	No	0.00	87.00	374.22
10/11/99	90.40	02/24/99	No	0.00	90.40	283.82
=====						
Total:	982.95		3	53.45	1,307.86	

Last Payment Date...: 02/24/99 Next Payment Date...:
 Last Payment Amount: 332.70 Next Payment Amount:
 Past Due Amount.....: 347.09

Registration Statement Print (RGST)

Overview

Use the Registration Statement Print (RGST) form to generate a printed record of a student's schedule and tuition charges. You can use these statements to request payment for the tuition and other charges.

Select the accounts you want statements printed for by using a saved list of IDs from the REG.AR.POSTINGS file, the selection options on the RGST form, or a combination of these options.

Sample Form

The screenshot shows the 'RGST-Registration Statement Print' form. It features a blue header bar. Below the header, there are several input fields: 'Print only new' (checkbox), 'Sort Sequence' (dropdown menu), 'Mail Rules for Adnl Copies' (text input with value '1'), and 'Reg User Group' (checkbox). A section titled 'Message Lines' contains two numbered input fields (1 and 2) with search icons. Below this is a 'Saved List Name' field and a 'Start/End Date' field with calendar icons. There are four groups of dropdown menus: 'Terms' (values 1, 2), 'Students' (values 1, 2), and 'AR Types' (values 1, 2). At the bottom, there is an 'Additional Selection Criteria' checkbox.

Sample Summary Report

07/07/99 02:42PM

Registration Statement Print

Page 1

Student	Mail To	Registration
ID 0018224	Mr. Jonathan Davis	Term.....: FA/99 09/01/99-12/19/99
Mr. Jonathan Davis		Date.....: 08/07/98
		Residency.....: I In State
		Academic Program(s): UG.UNDEC
		Ant Degree.....: AA
Advisor: Miss Abby MacEntire		Ant Cmpl Date.....: None
Office.: BH 202		

SCHEDULE

Course	Instructor	Days	Meeting Times	Location Bldg/Room	Inst Meth	Start Date	Credits STC CEUs Stat
Accounting Principles		MWF	09:00AM-09:50AM	BU 202	LEC	09/01/99	3.00cr New
Technical Writing		TTH	02:00PM-03:15PM	WH 301		09/01/99	3.00cr Dropp
Intro to Biology		MTWTH	11:00AM-12:00PM	CO 392	LAB	09/01/99	4.00cr Wait
Business Math		TW	05:00PM-06:15PM	BU 400	LEC	09/01/99	3.00cr New

CHARGES

Date	Number	Code	Description	Charge	Credit
03/11/99	000002802		Registration - 99/FA		
		ACT	Student Government	15.00	
		HLT	Health Service Fee	166.00	
		TPT	Tuition Part Time	750.00	
				Total:	
				931.00	0.00

Invoice Net.....:	931.00
Sponsor Payments.....:	0.00
FA Payments.....:	0.00
Payment Plans.....:	0.00
Deposit Allocations..:	0.00
Cash Payments.....:	0.00

Sample Detail Report

07/07/99 10:13AM

Registration Statement Print

Page 1

Student	Mail To	Registration
ID 0018224	Mr. Jonathan Davis	Term.....: FA/99 09/01/99-12/19/99
Mr. Jonathan Davis		Date.....: 08/07/98
		Residency.....: I In State
		Academic Program(s): UG.UNDEC
		Ant Degree.....: AA
Advisor: Miss Abby MacEntire		Ant Cmpl Date.....: None
Office.: BH 202		

SCHEDULE

Course	Days	Meeting Times	Location	Bldg/Room	Inst Meth	Start Date	Credits STC
Instructor							CEUs Stat
ACCT-101-01	MWF	09:00AM-09:50AM		BU 202	LEC	09/01/99	3.00cr New
Accounting Principles							
ENGL-231	TTH	02:00PM-03:15PM		WH 301		09/01/99	3.00cr Dropp
Technical Writing							
BIOL-100-02	MTWTH	11:00AM-12:00PM		CO 392	LAB	09/01/99	4.00cr Wait
Intro to Biology							
MATH-200-01	TW	05:00PM-06:15PM		BU 400	LEC	09/01/99	3.00cr New
Business Math							

CHARGES

Date	Number	Code	Description	Charge	Credit
03/11/99	000002802		Registration - 99/FA		
		ACT	Student Government	15.00	
		HLT	Health Service Fee	166.00	
		TPT	Tuition Part Time	750.00	
			Total:	931.00	0.00

Invoice Net.....: 931.00

Sponsor Payments.....: 0.00

FA Payments.....: 0.00

Payment Plans.....: 0.00

Sponsor Statement Reprint (SPSR)

Overview

Use the Sponsor Statement Reprint (SPSR) form to reprint specific student sponsorship statements. A sponsorship statement is a grouping of outstanding invoices.



Note: Do not use this process to reprint statements for course section sponsorships. Use the standard statement print process (initiated from the Registration Statement Print [RGST] form) to generate statements for sponsored course sections.

If you select one or more student sponsorships for which you have defined a specific statement format (using the Sponsor Statement Definition [SPSD] form) and have previously printed a statement, then Colleague uses those definitions to reprint the statements for those sponsors. Otherwise, Colleague uses a set of default settings to determine the level of detail displayed on the statement, the number of copies printed, and the amount of detail provided for each statement.

Refer to the *Using Accounts Receivable and Cash Receipts* manual for complete information about defining and generating sponsor statements.

Sample Form

SPSR-Sponsor Statement Reprint

Start/End Date

Name/Address Hierarchy

Print Reference Info

Statement Type

Saved List Name

Statements	Sponsor	Sponsor Name	Print Date
<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Sponsors

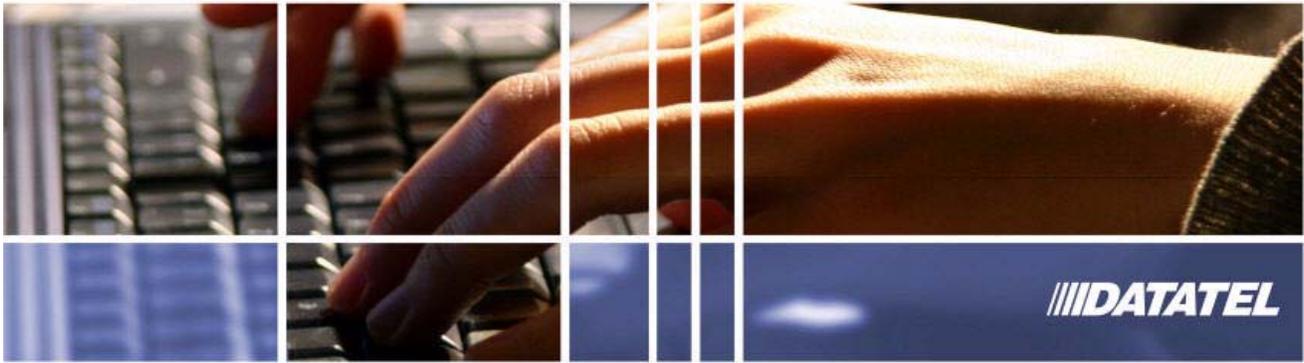
Student Sponsorships

Section Sponsorships

Additional Selection Criteria

Sample Report

06/24/99		STATEMENT OF CHARGES FOR SPONSORED STUDENTS					Page 1	
Statement Number: 47							Sponsorship: 33	
Statement Date...: 06/09/99							Contract...: SPRING AND SUMMER	
Statement Period: 01/01/98 to 06/24/99							Payment Due: 06/19/99	
Sponsor.....: 0018734 Mr. Johnathan Davis								
Mr. Johnathan Davis								
Student.....: 0018737 Mr. Jacob Brummet							Contact.....:	
AR								
Invoice	Code	Description	Inv Date	Term	Amount	Payments	Balance	
-----	-----	-----	-----	-----	-----	-----	-----	-----
000002834	06	Sponsor invoice to 000002830	03/12/99	99/SU	465.50	465.50 0.00		
000002839	06	Sponsor invoice to 000002830	03/12/99	99/SU	-465.50	-465.50 0.00		
Student Total:					0.00	0.00 0.00		
Student.....: 0018923 Mr. Michael Diggs							Contact.....:	
AR								
Invoice	Code	Description	Inv Date	Term	Amount	Payments	Balance	
-----	-----	-----	-----	-----	-----	-----	-----	-----
000003282	06	Sponsor invoice to 000003281	06/08/99	99/SU	1500.00	0.00	1500.00	
Student Total:					1500.00	0.00	1500.00	
Student.....: 0018736 Mr. David Locks							Contact.....:	
AR								
Invoice	Code	Description	Inv Date	Term	Amount	Payments	Balance	
-----	-----	-----	-----	-----	-----	-----	-----	-----
000002827	06	Sponsor invoice to 000002825	03/11/99	99/SU	54.00	54.00	0.00	
000002836	06	Sponsor invoice to 000002825	03/12/99	99/SU	411.50	46.00	365.50	
Student Total:					465.50	100.00	365.50	
Student.....: 0018733 Mr. Charles Smith							Contact.....:	
AR								
Invoice	Code	Description	Inv Date	Term	Amount	Payments	Balance	
-----	-----	-----	-----	-----	-----	-----	-----	-----
000002816	06	Sponsor invoice to 000002815	03/11/99	99/SU	465.50	465.50	0.00	
000002818	06	Sponsor invoice to 000002815	03/11/99	99/SU	-465.50	-465.50	0.00	



Student System Sample Reports

Recruitment/Admissions
Management Reports

Accepted Applications Report (ACAP)

Overview

Use the Accepted Applications (ACAP) form to obtain a listing of accepted applicants, using a number of criteria to select from. This report shows fee and deposit information, making it useful in gauging how well accepted applicants are moving towards matriculation.

You choose which applications Colleague includes in this report by selecting records from either a saved list of IDs from the APPLICATIONS file or by choosing specific criteria for selection of records from the APPLICATIONS file directly on the ACAP form. You can also use the selection options on the ACAP form along with a saved list of IDs.



Note: This report considers any application an "accepted" application if it's *current* application status is associated with the "AC" special processing code. Therefore, an application that was accepted and then moved to STUDENTS or rejected (and has a current application status associated with a special processing code other than AC) is not included in this report.

Sample Form

ACAP-Accepted Applications Report

Saved List Name

Start Terms

Acad Programs

Locations

Departments

Divisions

Schools

Dep Types Incl

Dep Types Excl

Additional Selection Criteria

Sample Report

June 24 1999
19:50

ACCEPTED APPLICATIONS

Page 1

School....:
Division...: BU
Department: ACCT

Acad Program: AA.ACCT

Start Term	Applicant	Name	Application Status	Application Fee Balance	- - - - - D E P O S I T - - - - - Deposit Type	Amount	Date
99/SP 1999	0018829	Nells, Larry	AC Accepted, Re	300.00	GXDS Gxd's General Use Deposit	200.00	04/20/99
					GXDS Gxd's General Use Deposit	100.00	04/20/99
99/SP 1999	0018844	Williams, Jason	AC Accepted, Re	300.00			
99/SP 1999	0018828	Jacobs, Mary	AC Accepted, Re	300.00			
99/SU 1999	0018638	Bell, Janice	AC Accepted, Re	300.00			

Admissions Waitlist Report (AMWL)

Overview

Use the Admissions Waitlist Report (AMWL) form to generate a list of waitlisted applications. This report provides information about each application:

- applicant name and ID
- anticipated start term
- current application status and the date and time the status was recorded
- application rating

Use this report to assist in making decisions about admitted applicants to waitlisted programs.

Specifying Output Options

After you complete this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.

Sample Form

AMWL-Admissions Waitlist Report

Sort by Institution Hierarchy Sort by Date and Time
Sort by Location

Saved List Name

Start Terms

Acad Programs

Locations

Departments

Divisions

Schools

Additional Selection Criteria No

Sample Report

1999 June 24
19:57

ADMISSION WAITLIST REPORT

School....:
Division..: BU
Department: ACCT

Location....:
Acad Program: AS.ACCTG

Start Term	Applicant	Name	Application Status	Status Date	Status Time	Application Rating
99/SP 1999	0017208	Jones, Eddie	WL	07/16/98	05:09P	30
99/SP 1999	0098763	Dodds, Marie	WL	07/19/98	03:08P	25

Application Counts (APCT)

Overview

Use the Application Counts (APCT) form to obtain a count of applications, accepted applications, and enrolled applicants for any group of applications. You can choose to generate an application count by any, or all, of the following:

- gender
- country
- state
- county
- admit institution
- institution type
- admissions representative

Colleague sorts this report, regardless of the reporting options you select, by academic level and, if you choose, by admit status and by academic program.

Sample Form

APCT-Application Counts

Print

By Gender	No	By County	No	By Admissions Rep	No
By Country	No	By Admit Inst	No		
By State	No	By Inst Type	No		

Break by Admit Status Break by Academic Program

Saved List Name

Start Terms

Academic Levels

Academic Programs

Admit Statuses

Application Statuses

Additional Selection Criteria No

Sample Report

June 24 1999
20:03

APPLICATION COUNTS
BY STATE

Academic Level...: GR

State	Gender	No of Applications	No Accepted Applications	No Enrolled

TOTALS FOR ACADEMIC LEVEL: GR				
Ohio	Male	24	24	24
	Female	16	16	16
	Total	44	43	43
Virginia	Male	1	1	1
	Female	1	1	1
	Total	2	2	1
Kentucky	Male	1	1	1
	Female			
	Total	1	1	1

Applicant Labels (APLA)

Overview

Use the Applicant Labels (APLA) form to generate mailing labels for a group of applicants. Colleague uses records from the APPLICANTS file to select individuals who have submitted an application and are therefore considered applicants. You can use either a saved list of IDs from the APPLICANTS file or the specific selection options on the APLA form to select which applicants Colleague will generate mailing labels for.

The mailing labels use a standard format, defined as the APPLICANT.LABELS form, that you can modify if this format does not meet your needs. You can modify this format in one of two ways: you can change the APPLICANT.LABELS format so that each time you run these labels the new format is used, or you can create a custom format that you specifically select whenever you need to use a variation of the default.

For example, the default format is a 3-up style label. If you always print your mailing labels as 2-up labels, change the APPLICANT.LABELS format so that the labels always print in that style. If you typically use the 3-up format but occasionally want to use the 2-up labels, you can create a custom form that you would substitute at the time of printing (by entering the form name in the Form field on the APLA form) each time you generate the labels.

You modify this format by using the Forms Processing forms in the Core application.



Note: This report prints alignment labels.

Sample Form

APLA-Applicant Labels

Form Name **APPLI LABELS Applicant Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End
Application Rating	<input type="text"/>	<input type="text"/>
Zip	<input type="text"/>	<input type="text"/>
Start Terms	<input type="text" value="1"/>	<input type="text"/>
Locations	<input type="text" value="1"/>	<input type="text"/>
Zips	<input type="text" value="1"/>	<input type="text"/>
Application Statuses	<input type="text" value="1"/>	<input type="text"/>
Admissions Reps	<input type="text" value="1"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

0052074
564-89-7254
Ms. Leslie Adams
2700 Ashton Oaks Drive
Fairfax VA 22030

0000187
234-98-7654
Thomas A. Brown
10123 Apollo Drive
Fairfax VA 22030

0051022
798-56-3021
Mr. Neil Davis
111 Fifth Avenue
Fairfax VA 22030

0018655
369-21-8745
Mr. Elijah Effram
411 Manning Circle
Annapolis MD 22011

0051301
Mr. William Hendrickson
3566 Twelfth Avenue
Baltimore MD 21234

0018375
965-11-1198
Mr. Richard Nanni
104 Summit Drive
Youngsville LA 70592

0000151
568-72-8105
Mr. Samuel Atkins
612 Harbor Side Drive
Boston MA 78391

0018650
468-02-5679f
Ms. Cherly Coffey
55 Main Street
Herndon VA 22045

0051746
201-89-5310
Mr. Patrick Davis
378 Eden Roc
Reston VA 21034

0001254
575-78-9175
Mr. Anthony Filiberto
P.O. Box 856
Catlett VA 22019

0051156
Mrs. Jenifer Johnson
3500 North Lane
Silver Spring MD 20901

0051217
399-96-4751
Mr. James Nelson
55 Nicklaus Court
Herndon VA 20170

0052093
231-56-8012
Mrs. Molly A. Bloom
11 Fountain Lane
Allentown PA 18945

0018703
302-84-5219
Ms. Holly Corral
432 Riding Way Avenue
Alexandria VA 23951

0018653
532-01-5978
Mr. Brian A. Donegal
1212 Howard Drive
Herndon VA 22045

0018656
359-40-6235
Mr. Fredrick Fillingham
15029 N Greenway Rd.
Glendale AZ 85308

0000100
Ms. Janice Murphy
2521 Hanover Avenue
Fairfax VA 20130

0014585
475-98-4478
Miss Anne Peters
535 Tomlyn Street
Shoreview MN 55126

Application List (APLS)

Overview

Use the Application List (APLS) form to generate a list of applicants who have applied to selected academic programs.

You identify the applications you want to generate the report for by using either a saved list of IDs from the APPLICATIONS file or by specific selection options available on the APLS form. You can use the saved list along with the selection options to obtain the exact group of applications you are interested in.

You can also indicate how you want Colleague to sort the applications selected for this report by entering "Y" in the different sort option fields on the APLS form. By default, Colleague sorts the report as follows:

- by academic program
- by start term
- by name (last, first, then middle name)

In addition to this default order, you can select to sort the report by institutional hierarchy (which sorts the list by school, by division, and by department), by location, or by application rating. If you select any of these sort options, Colleague sorts the report by the options you select and then by the default order listed above.

Sample Form

APLS-Application List

Sort by Inst Hierarchy Print ID or SSN ID

Sort by Location

Sort by Rating

Saved List Name

Application Rating Begin End

Admissions Reps

Start Terms

Application Statuses

Academic Programs

Schools

Divisions

Departments

Locations

Additional Selection Criteria No

Sample Report

June 24 1999
20:08

APPLICATION LIST

Page 3

Location.....
Acad Program: AA.ACCT

Location	Academic Program	Start Term	Applicant ID	Applicant Name	Application Date	Current Status	Status Date	Rtg
AA.ACCT		99/FA	0003671	Alle, Carlton	12/05/96	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/FA	0010275	Amey, Fredrick	12/10/96	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/FA	0010275	Avery, John	12/10/96	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/FA	0003675	Barret, Jarod	12/04/96	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/SP	0018256	Bickley, Carlos	09/04/98	AD Admitted (MOVED to S	09/04/98	
AA.ACCT		99/FA	0018217	Blass, Bill	07/28/98	AD Admitted (MOVED to S	07/28/98	
AA.ACCT		99/FA	0018377	Brown, Tim	10/20/98	AD Admitted (MOVED to S	10/20/98	
AA.ACCT		99/FA	0018318	Brummet, Klynt	10/06/98	AD Admitted (MOVED to S	10/06/98	
AA.ACCT		99/FA	0001160	Clarke, Gary	02/20/97	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/FA	0018460	Clawson, Dan	12/14/97	AD Admitted (MOVED to S	12/14/98	
AA.ACCT		99/FA	0018420	Corey, Miranda	11/04/98	AD Admitted (MOVED to S	11/04/98	
AA.ACCT		99/FA	0010214	Damon, Walter	12/06/96	AD Admitted (MOVED to S	12/06/96	
AA.ACCT		99/FA	0018825	Davis, Johnathan	04/19/99	AD Admitted (MOVED to S	04/19/99	
AA.ACCT		99/FA	0018920	Deeny, Samantha	06/07/99	AD Admitted (MOVED to S	06/07/99	
AA.ACCT		99/FA	0018922	Dime, Neal	06/07/99	AD Admitted (MOVED to S	06/07/99	
AA.ACCT		99/SP	0018926	Drake, Danial	06/08/99	AD Admitted (MOVED to S	06/08/99	
AA.ACCT		99/FA	0018903	Drew, Chalie	05/25/99	AD Admitted (MOVED to S	05/25/99	
AA.ACCT		99/FA	0010216	Dunes, James	12/06/96	AD Admitted (MOVED to S	12/06/96	
AA.ACCT		99/FA	0018909	Evon, Elijah	05/27/99	AD Admitted (MOVED to S	05/27/99	
AA.ACCT		99/FA	0018904	Franks, Eric	05/25/99	AD Admitted (MOVED to S	05/25/99	
AA.ACCT		99/FA	0018829	Harris, Rodney	04/20/99	AC Accepted, Regular De	04/20/99	
AA.ACCT		99/FA	0018835	Harrison, Kathryn	04/21/99	AD Admitted (MOVED to S	04/21/99	
AA.ACCT		99/FA	0018879	Haydn, Kyle	05/18/99	AD Admitted (MOVED to S	05/18/99	
AA.ACCT		99/FA	0018833	High, Derrick	04/21/99	AD Admitted (MOVED to S	04/21/99	
AA.ACCT		99/FA	0018925	James, Arnold	06/08/99	AD Admitted (MOVED to S	06/08/99	
AA.ACCT		99/FA	0018836	Jingle, Maria	05/07/99	AD Admitted (MOVED to S	05/07/99	
AA.ACCT		99/FA	0003637	MacElroy, Jillian	12/03/96	AD Admitted (MOVED to S	02/20/97	
AA.ACCT		99/FA	0003686	Meeny, Gary	02/20/97	AD Admitted (MOVED to S	12/04/96	
AA.ACCT		99/FA	0003685	Minder, Hugh	02/20/97	AD Admitted (MOVED to S	12/04/96	
AA.ACCT		99/FA	0018798	Molden, Robert	04/08/99	AD Admitted (MOVED to S	04/08/99	
AA.ACCT		99/FA	0018317	Nanni, Richard	10/06/98	AD Admitted (MOVED to S	10/06/98	
AA.ACCT		99/FA	0018266	Nelson, Jeffrey	09/08/98	AD Admitted (MOVED to S	09/08/98	
AA.ACCT		99/FA	0018532	Newbold, Julia	01/22/99	AD Admitted (MOVED to S	01/22/99	
AA.ACCT		99/FA	0018851	Newbold, Nicklaus	05/03/99	AD Admitted (MOVED to S	05/03/99	
AA.ACCT		99/FA	0018850	O'Neil, Kimberly	05/03/99	AD Admitted (MOVED to S	05/03/99	
AA.ACCT		99/FA	0018469	Patton, John	12/18/98	AD Admitted (MOVED to S	12/18/98	
AA.ACCT		99/FA	0018348	Perkson, Nancy	10/15/98	AD Admitted (MOVED to S	10/15/98	
AA.ACCT		99/FA	0018806	Priest, Christopher	04/14/99	AD Admitted (MOVED to S	04/14/99	
AA.ACCT		99/SP	0018805	Roberts, Samuel	04/14/99	AD Admitted (MOVED to S	04/14/99	
AA.ACCT		99/FA	0018796	Smith, James	04/07/99	AD Admitted (MOVED to S	04/07/99	
AA.ACCT		99/FA	0018773	Stryker, Brian	03/26/99	AD Admitted (MOVED to S	03/26/99	
AA.ACCT		99/FA	0018868	Till, Ryan	05/14/99	AD Admitted (MOVED to S	05/14/99	
AA.ACCT		99/FA	0018555	Ubler, Jonathan	01/25/99	AD Admitted (MOVED to S	01/25/99	

Application Status Summary (APSS)

Overview

Use the Application Status Summary (APSS) form to generate a report for tracking your applicants by application status. With this report you determine the applications that Colleague selects for the report, the order in which Colleague sorts the selected applications, and the way that you group together your application status codes for the report.

Before you can generate the application status summary report you must have

1. associated each application status with a report column number
2. defined titles for each column in the report

For this report you define which application statuses are included in up to eleven columns of the report. You make this assignment based on the application status code. For example, if you want all applications with the status "applied," counted in the second column of the report, enter 2 in the Column Number field of the Application Statuses (APSM) form when you define the "applied" status code. Then change the default title of column two for this report to "Applied" (the report column titles are defined as special processing codes for the APPL.STATUS.COLUMNS validation code table). Refer to the *Using Recruitment/Admissions Management* manual for details on setting up the application status report.

Sample Form

APSS-Application Status Summary

Saved List Name

Start Terms

Academic Levels

Academic Programs

Locations

Additional Selection Criteria

Sample Report

June 24 1999
20:09

APPLICATION STATUS SUMMARY

Start Term.....: 99/FA Fall Semester '99
 Academic Level..: GR Graduate
 Academic Program: JD.LAW JD.LAW
 Gender.....: Female
 Admit Status....: TR Transfer Undergrad

Housing Desired	Total Listed	APPLIED	ACCEPTED	Denied	Wait List	Post Poned	Incomp File	To Dept	----W I T H D R E W----						
									Bef	Dec	Aft	Dec	Aft	Dep	Defer
Yes	2			2											
Admit Status Total:	2			2											
Gender Total:	3			3											

Institution Labels (INLA)

Overview

Use the Institution Labels (INLA) process to generate labels for your institution. Colleague selects institutions for labels with the institution type and zip codes you specify on the form. The format for these labels is stored in a Communications Management Forms Processing record (INSTITUTION.LABELS).

The INLA process allows you to specify criteria and uses that information in conjunction with the form layout to select from the INSTITUTIONS file, creates a workfile for fields that must be sorted but are not accessible from those files (For example, zip code) and generates labels in the format specified.



Note: If you do not specify any limiting criteria, Colleague selects the entire INSTITUTIONS file for label printing.

If you want the INLA procedure to recognize a contact on the corporation record as an actual contact to be used for the mailing address, you must detail to the Name/Address Selection Parm (NASP) form from the Name/Address Selection field. Add the appropriate contact code to the Contact Code field on the NASP form.

If you want to select institutions by zip code, you can enter either a range of zip codes or specific zip codes, but not both.

The INLA process also sorts and creates a report for postal sorting if a postal sort code is entered and selects addresses according to specifications, including:

- Address hierarchy
- mail rules to include or exclude
- joint or individual mail If an activity is specified, it will be updated with the number of pieces and the form ID. If history is to be updated, the mailing history file is updated with the form ID and the date mailed.



Note: This report prints alignment labels.

Sample Form

INLA-Institution Labels

Form Name **INST.LABELS Institution Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

Begin End

Zip

Institution Type

Zips

Additional Selection Criteria

Sample Report

0001021
Kent State Univeristy
Marshall Hilyard
334 Goodfellow Road
Kent OH 44240

0001061
New Jersey College
Dave Fersch
99 Morris Avenue
Union NJ 07083

0016212
Tridelt University
Mr. Jim Turner
4400 University Drive
Fairfax VA 22033

0018381
Virginia Institute of Marine Science
Dr. Brian Brown
123 Water Lane
Newport VA 23181

0028975
Georgetown University
Miss Erin Broker
5469 Fountain Blvd
Georgetown VA 89743

0037890
Washington Central University
Mr. Robert Rieger
8964 Main Street
Washington D.C. 45321

0001040
Suny Cortland College
Irma Walters
432 Main Street
Cortland NY 13482

0001062
Inca College
Kyle Haydn
798 Mackerd Drive
Inca NY 08976

0017537
Purdue University
Mrs. Jane Alderidge
908 High Street
Lafayette IN 78640

0019689
Olirst Community College
Mr. Jack Rhine
989 Robin Road
Bucks County PA 18923

0029535
Amherst Community College
Mr. Michael Ott
986 Tenth Street
Amherst MA 76403

0055789
Hoosier State University
Mr. Bill Ivarson
896 Seventeenth Street
Bloomington IN 47407

0001057
Bowling Green State University
Harold Walters
889 Raleigh Blvd
Bowling Green OH 44204

0001103
Darson State University
Dr. Millard E. Elrod
P.O. Box 4419
Montgomery AL 36103

0100000
College of William and Mary
Miss Lisa M. Glisson
100 Sunrise Street
Williamsburg VA 23185

0025879
Lafayette University
Ms. Janet Smith
706 Maple Street
Easton PA 45632

0036897
University of West Virginia
Mr. Christopher Parker
785 South Avenue
Charleston WV 89673

0065987
University of New Reston
Dr. Terry Nanni
8796 Washer Avenue
Richmond VA 78943

Prospect/Applicant Profile (PAPP)

Overview

Use the Prospect/Applicant Profile (PAPP) form to generate detailed or summary profiles of selected prospects or applicants.

The profile provides the following detailed information about the selected prospects or applicants:

- admissions representative and AARS assigned
- prospect rating
- EPS code
- institutions attended information
- recruitment purpose information
- educational and career goals
- summary application information
- contact history
- test scores

If you choose to generate the summary version of this report, Colleague provides the following information:

- name, address, and phone number
- general recruitment information
- contact history
- admit status
- prospect status
- prospect rating
- available application information

To generate this profile, you select the prospects or applicants that you want a profile on by either identifying a saved list of IDs from the APPLICANTS or APPLICATIONS file or by using the selection options on the PAPP form.

You also select whether you want to run this profile for prospects, applicants, or both. Colleague determines whether an individual is a prospect or an applicant by first determining whether any application information has been

entered for that individual. If no application information has been recorded, Colleague considers the individual a prospect and only includes them in the profile if you entered "Y" in the Print Prospects field.

If application information has been recorded for an individual, Colleague reviews the application statuses associated with that information. If any status exists that indicates the person has submitted an admissions application, then Colleague considers that person an applicant and only includes them in the profile if you entered "Y" in the Print Applicants field.

Refer to the *Using Recruitment/Admissions Management* manual for complete information about how Colleague determines whether an application status code indicates that an individual has submitted an admissions application.

Sample Form

PAPP-Prospect/Applicant Profile

Name/Address Hierarchy Print SSN

Summary Format Print All Applications

Saved List Name (APPLICANTS)

Saved List Name (APPLICATIONS)

	Begin	End
Prospect Ratings	<input type="text"/>	<input type="text"/>
Appl Ratings	<input type="text"/>	<input type="text"/>
Zip Codes	<input type="text"/>	<input type="text"/>
Admissions Rep	<input type="text"/>	
Admit Institution	<input type="text"/>	<input type="text"/>
Start Terms	<input type="text"/>	<input type="text"/>
Academic Levels	<input type="text"/>	<input type="text"/>
Locations	<input type="text"/>	<input type="text"/>
Prospect/Applicants	<input type="text"/>	<input type="text"/>

Print Prospects

Prospect Statuses

Print Cur Stu Only

Print Applicants

Application Statuses

Addnl Selection Criteria

Sample Report

June 25 1999										PROSPECT/APPLICANT PROFILE	Page
1											
08:20											
Admit From Institution: *** None ***											
Academic Program ID/SSN Location	Name/Nickname/ Address/Phone	Admit Status	Intd Load	Educ Goals	Start Term/ Rct -Prospect- For Status Rtg	Application Ints Status Rtg	-- Contacts -- Date	Type			
-----	-----	-----	----	----	-----	-----	-----	-----	-----		
0016877 007-00-0313 *STUDENT*	James W. Tackson 4648 Thoroughgood Dr Virginia Beach VA 23455			U U CH PHOTO WEAVE SC FB MB 03 DR	04 12-16 5-7				SERI		
0016869 007-00-0308 *STUDENT*	Christina M. Taem 8428 Mckenzie Ci Manassas VA 22110			PHD PHD CH EX GF SG WEAVE SC MB DR	05 12-16 5-7 8-11				SERI		
0016871 007-00-0309 *STUDENT*	Rebecca L. Taements 228 Church St Rocky Mount VA 24151			BA BA CH GF MB PHOTO SC TOURS BA	01 5-7				SERI		
0016883 007-00-0317 *STUDENT*	Brooke A. Taemer 6846 Murray Lane Annandale VA 22003			UNDC UNDC GF MB	12-16 5-7				SERI		

Prospect Labels (PRLA)

Overview

Use the Prospect Labels (PRLA) form to generate mailing labels for a group of prospects. Colleague uses records from the APPLICANTS file to select individuals who have not yet submitted an application and are therefore considered prospects. You can use either a saved list of IDs from the APPLICANTS file or the specific selection options on the PRLA form to select which prospects Colleague will generate mailing labels for.

The mailing labels use a standard format, defined as the PROSPECT.LABELS form, that you can modify if this format does not meet your needs. You can modify this format in one of two ways: you can change the PROSPECT.LABELS format so that each time you run these labels the new format is used, or you can create a custom format that you specifically select whenever you need to use a variation of the default.

For example, the default format is a 3-up style label. If you always print your mailing labels as 2-up labels, change the PROSPECT.LABELS format so that the labels always print in that style. If you typically use the 3-up format but occasionally want to use the 2-up labels, you can create a custom form that you would substitute at the time of printing (by entering the form name in the Form field on the PRLA form) each time you generate the labels.

You modify this format by using the Forms Processing forms in the Core application.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.



Note: This report prints alignment labels.

Sample Form

PRLA-Prospect Labels

Form Name **PROSP.LABELS Prospects Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End
Prospect Rating	<input type="text"/>	<input type="text"/>
Zip	<input type="text"/>	<input type="text"/>

Prospect Statuses

Admissions Reps

Zips

Additional Selection Criteria

Sample Report

0000620
763-28-3764
Ms. Bethany L. Bane
983 Confederate Lane
Fairfax VA 22030

0018414
564-89-7832
Mr. Rick Mannik
7693 Sunrise Drive
Fairfax VA 22033

0017980
321-89-4578
Miss Maria Nanni
56 Sunset Road
Annandale VA 45742

0013022
028-68-4490
Mr. Jerry Peterson
51 Shawsheen St.
Tewksbury MA 01876-4037

0000401
343-43-4343
Ms. Barbara Roberts
41 Fountainhead Blvd
Montgomery Al 36117

0018361
238-47-6238
Mr. Keith Totts
124 Main St.
Pella IA 50219

0010237
987-56-7984
Mr. Charles Goldmann
2121 East Hanover Drive
Harrisburg PA 17111

0018003
980-80-7453
Dr. James Mills
46 Van Dorn Street
Alexandria VA 22304

0015894
463-03-2153
Mr. John Jr. Offerman
1 Kingswoods Drive
Richmond VA 73957

0001284
548-32-9863
Dr. Anne L. Quinn
4410 Lees Corner Road
Chantilly VA 22021

0000210
354-21-3545
Mr. Douglas B. Smith
2521 Hanover Drive
Fairfax VA 22033

0016869
007-00-0308
Mrs. Christina Tyme
8428 Mckenzie Circle
Manassas VA 22110

0018921
124-09-8543
Miss Rachael Mack
7783 Tenth Street
Richmond VA 23983

0018633
845-56-4782
Ms. Kimberly Moore
453 Teter lane
Lafayette PA 65739

0016282
789-25-6348
Mrs. Lauren Peters
9843 Nicklaus Court
Herndon VA 20170

0000017
145-74-5689
Mr. Michael Rieger
72-48 Woodside Avenue
Woodside NY 11378

0016979
999-11-1105
Miss Michelle Striker
106 Azalea Avenue
Abbeville LA 70510

0017979
443-23-7234
Dr. Kyle Walters
2600 Gloucester Ave.
Middlesboro KY 40965

Transfer Equivalency Report (TRER)

Overview

Use the Transfer Equivalency Report (TRER) form to obtain a printout of an individual's transfer course equivalency evaluations. You can generate this report for any number of individuals, selecting the individuals by a saved list of IDs, by entering their name or ID directly, by selecting specific institutions or equivalent courses, or by equivalency status.

The transfer equivalency report provides information about each external course and the corresponding equivalent courses assigned. The report also provides transfer credit totals for both the equivalent courses and the transfer courses.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Report in Phantom Mode

The last form that is displayed when you run this report is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in phantom (background) mode.

Sample Form

TRER-Transfer Equivalency Report

Print Equiv Desc Name/Address Hierarchy
Print Address

Saved List Name

Applicants/Students

Institutions

Equiv Courses

Statuses

Additional Selection Criteria No

Sample Report

June 25 1999
08:25

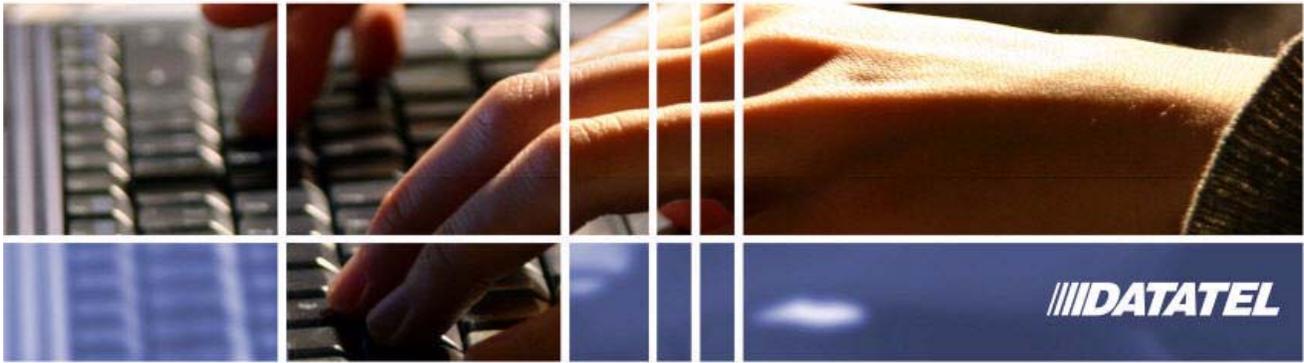
TRANSFER EQUIVALENCY REPORT

Student.....: 0000664 Ms. Joanne K. Fulton
1730 Crooked Oak Drive
Lancaster, PA 17601

Institution: Lotus State Community College

Acad Programs: BA.ACCT
HISTORY.BA

----- T R A N S F E R -----					----- E Q U I V A L E N T -----					
Course	Title	Credits	Gr	End Dt	Course/ Subject/Crs Lvl Dept	GR/ Dept	Credits	Type	Acad Lvl	Status
ACCT*0001	Accounting Intro	3.00	C	12/12/99	ACCT-101		2.00	3	UG	TR
Total for Ms. Joanne K. Fulton		3.00	Transfer Credit				2.00	Equiv Transfer Credit		



Student System Sample Reports

Campus Organization Reports

Campus Org Advisor Labels (COAL)

Overview

Use the Campus Org Advisor Labels (COAL) form to print campus organization advisor labels. You can either send the labels to a file or to a printer.



Note: This report prints alignment labels.

Sample Form

COAL-Campus Org Advisor Labels

Form Name **COADV.LABELS Campus Org Advisors Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection

Saved List Name

Begin End

Zip

Active Date

Campus Orgs

Roles

Zips

Additional Selection Criteria

Sample Report

0000417
234-82-3467
Mr. James R. Cuthbert
214 Maple Ave.
Rochester NY 14624-1986

0017988
001-00-1100
Ms. Paula S. Leonard
1232 Bradford Way
Apt. 14
Dallas TX 75241

0018096
134-45-4234
Ms. Teresa Kletke
2949 Maple Ave.
Fairfax VA 22033

0018156
123-45-6789
Mrs. Gena Yoeman
2530 Calvert Cliffs Road
Centreville VA 22020

0019025
554-98-7845
Mr. Arnold Hendrickson
556 Nicklaus Court
Herndon VA 20170

0019101
457-89-1342
Mr. Brian R Stryker
8908 Villa Lane
Turkey WV 98645

0017740
213-29-7685
Candy Braun
100 Central Avenue
Northfield MN 55057

0018005
222-90-2200
James Skiff
123 Fourth Street
Rockville MD 20799

0018113
218-74-4504
Mr. Thomas Mallett
202 Valley View Avenue
Leesburg VA 22075

0018157
222-93-8711
Marvin W. Vanwyk
10629 Front Lane
Fairfax VA 20990

0019038
021-55-4785
Ms. Barbara Meek
4589 Old York Rd.
Annapolis MD 44352

0019183
125-36-9546
John Robert Jung
896 West Drive
Elon College, NC 90864

0017962
888-89-0000
Ms. Melissa J. Dillon
1315 Bradforn Wood Ct.
Dallas TX 75241

0018021
575-37-2022
Ms. Majorie Cooke
4375 Fair Lakes Court
Fairfax VA 22033

0018134
222-50-7700
James M. Hennessey
176 Fifth Street
Dover DE 19901

001899
123-65-8988
James Brummet
333 Eden Court
Hopewell PA 33488

0019047
223-98-5461
Miss Sara R. Schrock
998 Little Kettle Drive
Rockwood PA 54325

0019197
458-32-1025
Miss Katey Harrison
908 Love Lane
Richmond VA 78436

Campus Org ID Cards (COID)

Overview

Use the Campus Org ID Cards (COID) form to generate and/or print ID cards for members of campus organizations. You can determine which address will be printed in the cards as well as the valid time period.

You can also enter general selection information and specific selection criteria.



Note: This report prints alignment labels.

Sample Form

The screenshot shows a web form titled "COID-Campus Org ID Cards". The form has a blue header bar. Below the header, the "Form Name" is set to "CMP.ORG.MEM.ID.CARDS". There are several input fields: "Name/Address Hierarchy" (empty), "Valid For Term" (empty), "Select Members" (Yes), "Valid From Date" (empty), "Select Advisors" (No), and "Valid To Date" (empty). Below these is a "Saved List Name" field (empty). The "Campus Organizations" section contains a list of eight numbered rows (1-8) with empty input fields. At the bottom, "Additional Selection Criteria" is set to "No".

Sample Report

0000588
458-79-6348
Mr. Johnathan Augenblick
Member in Good Standing

0004578
798-56-1248
Ms. Rachael Balley
Departmental Chair/Head

0025489
326-89-4579
Mr. Rodney Blake
Faculty Advisor

0000056
795-43-8437
Mr. Robert Carney
President

0008624
203-06-8976
Miss Shirley Cooke
Faculty Advisor

0056797
564-82-1347
Mr. Harry D'Angelo
Member in Good Standing

0098506
326-02-8915
Mrs. Jacklyn Evans
Departmental Chair/Head

0006598
268-54-3249
Mr. Adam Fryar
Membership Director

0054679
359-81-7305
Miss Abigail Gill
Member in Good Standing

0026579
458-92-6531
Mr. Kevin Glassey
Faculty Advisor

0065978
674-20-3497
Dr. Bradley Grey
Treasurer

0002349
521-53-4978
Miss Jenifer Harris
Member in Good Standing

0004102
678-13-4973
Mrs. Maria Jackson
Membership Director

0056721
789-46-1230
Mr. Ryan Moore
Vice President

0000231
210-65-3297
Miss Cheryl Nystrom
Departmental Chair/Head

0021978
643-28-9401
Mr. Michael Ott
Member in Good Standing

0064972
319-40-6723
Mr. Jonathan Patton
Faculty Advisor

0006301
564-10-3597
Mr. Christopher Priest
Membership Director

Campus Org Membership Labels (COML)

Overview

Use the Campus Organizations Membership Labels (COML) form to print mailing labels of members' names and addresses associated with specified campus organizations. You can specify different selection criteria to narrow the selection of members.

For example, you may only want to select members (from the specified organizations) with specific zip or postal codes. You can enter those zip or postal codes in the Zip Codes (or Postal Codes) field. Or, you can specify a range of zip or postal codes in the Zip Code (or Postal Code) field.



Note: This report prints alignment labels.

Sample Form

COML-Campus Org Membership Labels

Form Name **COMEM.LABELS Campus Org Members Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End
Zip	<input type="text"/>	<input type="text"/>
Active Date	<input type="text"/>	<input type="text"/>
Campus Orgs	<input type="text" value="1"/>	<input type="text"/>
Roles	<input type="text" value="1"/>	<input type="text"/>
Zips	<input type="text" value="1"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

0000010
005-891-239
Mr. James M. Smithfield
300 College Avenue
Rochester NY 14624

0000051
232-44-5678
Mr. William Patterson
1205 S. 5th St.
Milbank SD 57252

0000058
233-45-6543
Mr. Guy L. Sheib
5128 S. Wayne Avenue
Fort Wayne IN 46807

0000066
546-88-7541
William T. Douglas
113 Tracy Place
Annandale VA 22003

0000070
123-12-8745
Miss Peggy A. Underwood
3695 Moorehead Court
Boulder CO 80302

0000077
541-23-6987
Mark G. Moore
45 Little Creek Way
Fairfax VA 22033

0000020
156-78-9564
Ms. Jessica A. Smith
144 Elm Avenue
Scarsdale NY 11578

0000054
541-23-8794
Christy Emmanuel
1148 Daleview Drive
Falls Church VA 22110

0000059
456-23-4563
Mr. Duncan K. Foster
1301 Belle Avenue
Topeka KS 66604

0000067
567-89-1011
Mr. James P. Ullery
4 Aberdale Lane
Latham NY 12110

0000074
521-87-4569
Kristen A. Kiley
1234 Morning Glory Lane
Oakton VA 22030

0000078
125-35-1254
Lt. Eric T. Nelson, U.S.N.
234 Perry Drive
Monterey CA 90015

0000048
251-33-3558
Mr. Paul Gaff
45 Grace Court
Brooklyn NY 11201

0000056
567-89-2000
Mr. Albert W. Swanson
3478 Culpepper Court
Arlington Va 22304

0000065
316-22-5416
Mrs. Eileen Thompson
8309 Burdette Road
Longview TX 75607

0000069
201-45-6874
Mr. Curtis Van Buren
3860 Vanden Road
Minnetonka MN 55343

0000075
125-48-6547
Patricia Cantillion
456 Old Courthouse Road
Reston VA 22501

0000079
123-54-8887
John C. Fisher, III
123 Fourth Street
Dover DE 19901

Campus Organization Roster (CORS)

Overview

The Organization Roster form is used to request the printing of a roster for one or more campus organizations. Both the campus organization members and advisors will be printed on the output in separate sections. You may specify whether roles and grades will be printed on the roster.

Sample Form

The screenshot shows a web form titled "CORS-Campus Organization Roster". The form is divided into several sections. At the top, there is a blue header bar. Below it, the form contains the following fields and controls:

- Name/Address Hierarchy:** A text input field.
- From Date:** A date input field.
- To Date:** A date input field.
- Print Roles:** A checkbox.
- Print GPA:** A checkbox.
- Directory Codes Incl:** A dropdown menu with "1" selected.
- Directory Codes Excl:** A dropdown menu with "1" selected.
- Saved List Name:** A text input field.
- Campus Org Types:** A list of six dropdown menus, each with "1" selected.
- Campus Orgs:** A list of six dropdown menus, each with "1" selected.
- Additional Selection Criteria:** A dropdown menu with "No" selected.

Sample Report - Membership Roster

06/29/99
09:50AM

CAMPUS ORGANIZATION ROSTER

Campus Organization: 0001 Rugby Club

Member Name/ Address	- M E M B E R S H I P -		Acad Status	Level	GPA	Cum GPA
-----	Start Dt	End Dt	-----	-----	-----	-----
Mr. Casey Atkins 1232 Mclean Park Road Falls Church VA 22043	01/01/95 01/01/90	01/01/99 01/01/94	GOOD	UG	3.500	3.500
Russ Brunell Fairfax VA 22033	09/14/99	12/01/99		UG	1.000	1.000
Mr. Anthony Cantillion 1212 Armore Lane Vienna VA 22180	02/0/98	09/13/99	APPT			
Mr. William T. Douglas 113 Tracy Place Annandale VA 22003	09/02/98	12/15/98		UG VC	2.713 0.000	2.713 0.000
Ms. Shennen Duncon 100 Ocean View Pearl City CO 96782	01/20/99	05/20/99	GOOD	UG	2.000	2.000
Ms. Christy Emmanuel 1148 Daleview Drive Falls Church VA 22110	09/02/95	12/15/97		UG VC	3.750 0.000	3.750 0.000
Mr. John C. Fisher, III 23 Oakton Park Washington DC 20007	09/03/97	12/16/97		UG GR	1.000 3.500	1.000 3.500
Mr. Duncan K. Foster 1301 Belle Avenue Topeka KS 66604	09/06/94	09/15/98		UG VC	3.323 0.000	3.323 0.000

Sample Report - Advisor Roster

06/29/99
09:50AM

CAMPUS ORGANIZATION ROSTER

Page 2

Campus Organization: 0001 Rugby Club

Advisor Name/ Address	A D V I S I N G Start Dt End Dt

Mr. Casey Atkins
1232 Mclean Park Road
Falls Church VA 22043

02/01/99

Miss Kelly Paulus
123 4th Street
Manassas VA 22110

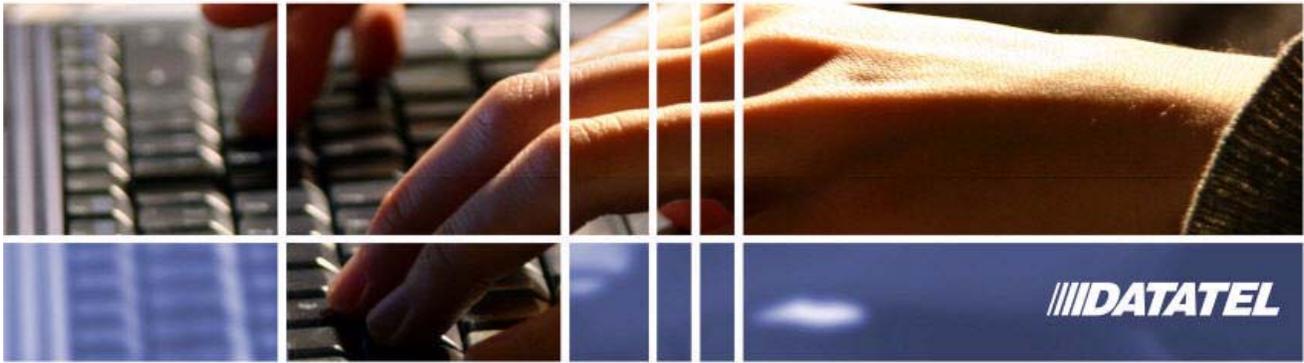
01/20/98 05/20/98

Miss Nicole Ryan
4375 Fairlakes Circ
Fairfax VA 22033

01/01/99 12/31/99

Mr. Brian Scott
89 East Third Street
Centreville VA 22012

02/15/98



Student System Sample Reports

Cash Receipt Reports

Bank Deposit Report (BDEP)

Overview

Use the Bank Deposit Report (BDEP) to generate a report that itemizes the receipts included in selected bank deposits. You run this report by date and by specified banks.

Sample Form

The screenshot shows a web-based form titled "BDEP-Bank Deposit Report". The form has a blue header bar. Below the header, there are two input fields for "Start Date" and "End Date", each with a calendar icon to its right. Underneath these fields is a section labeled "Banks" containing a list of seven numbered input fields (1 through 7) for selecting banks. At the bottom of the form, there is a label "Additional Selection Criteria" followed by a red button labeled "No".

Sample Report

June 29 1999 09:54		BANK DEPOSIT REPORT				Page 1
Date	Deposit Number	Bank	Bank Account Number	Payment Method	Session(s) Total	Deposit Amount
10/02/99	1	General Checking	10123456789	AMX American Express	10937.00	10,937.00
				CASH	43598.77	43,598.77
				CC-1 Credit Card-no limit	105.00	105.00
				CK Check	70320.11	70,320.11
				CK-1 Check-no limit	3400.00	3,400.00
				MC MasterCard	225.00	225.00
				VSA VISA Charge	15050.00	15,050.00
						=====
				Deposit Total:		143,635.88
10/02/99	2	Swiss Royal Bank	90123456789	CASH	910.00	910.00
				CC Credit Card	3787.45	3,787.45
				CK Check	8269.29	8,269.29
				CK-1 Check-no limit	516.53	516.53
						=====
				Deposit Total:		13,483.27
10/02/99	3	American First Union Bank		CASH	100.00	100.00
						=====
				Deposit Total:		100.00
						=====
				Day Total:		157,219.15

CR Batch Reconciliation Rpt (CRBR)

Overview

Use the Cash Receipt Batch Reconciliation Report (CRBR) to generate a report of all cash receipts associated with one or more cash receipt batches prior to reconciling that batch. This report provides a detailed listing of each receipt processed in the selected batches and provides batch totals.

You can choose the batches that you include in the report by using a saved list of IDs from the RCPT.BATCHES file, by using the selection options on the CRBR form, or a combination of these options.

After you verify that all receipts in the selected batches were properly recorded, you can reconcile the batch using the Cash Receipt Batch Control (CRBC) form.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.

Sample Form

CRBR-CR Batch Reconciliation Rpt

Start Date 

Cutoff Date 

Print Summary Yes

Saved List

Locations 1 2 

Cashiers 1 2 

Sessions	Start Dt	St Time	End Dt	End Time	Status
<input type="text"/> 1	<input type="text"/>				
<input type="text"/> 2	<input type="text"/>				

Batches 1 2 

Start Dt	Status
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Additional Selection Criteria No

Sample Report

June 29 1999
09:56

CR BATCH RECONCILIATION RPT

Page 3

Batch Number.....: 1
Location.....:
Expected Amount.....: 170.00
Expected Number of Items: 4

Session: 3
Status: Reconciled
Cashier: Ro

Receipt Number	Receipt Date	Payer ID/Name	Type	Amount Allocated	Amount Received	Change Returned
000000001	11/25/99	0001174	Davis, Johnathan	35.00	5.00	0.00
000000002	11/25/99	0001175	Jacobs, Mary	10.00	5.00	0.00
000000004	11/25/99	0001190	Goldmann, James	10.00	100.00	0.00
DUPLICATE	11/25/99	0001162	Priest, Christopher	25.00	25.00	0.00
				-----	-----	-----
Batch Total:				80.00	135.00	0.00

Cash Receipt Print (CSRP)

Overview

Use the Cash Receipt Print (CSRP) form to identify one or more specific payments for which you want to print a cash receipt.

You can identify the payments you want to print by using:

- saved list of IDs from the CASH.RCPTS file
- the selection options on the CSRP form
- a combination of these options

Sample Form

The screenshot shows a web-based form titled "CSRP-Cash Receipt Print". The form has a blue header bar. Below the header, there are several input fields and controls:

- Start Date**: A text input field with a calendar icon.
- End Date**: A text input field with a calendar icon.
- Status**: A dropdown menu.
- Detail**: A checkbox labeled "Yes".
- Print Only New**: A checkbox.
- Saved List Name**: A text input field.
- Sessions**: A section with two rows, each containing a small box with the number "1" or "2" and a text input field with up/down arrow buttons.
- Batches**: A section with two rows, each containing a small box with the number "1" or "2" and a text input field with up/down arrow buttons.
- Cash Receipts**: A section with two rows, each containing a small box with the number "1" or "2" and a text input field with up/down arrow buttons.
- Additional Selection Criteria**: A checkbox labeled "No".

Sample Report

Receipt: 000200866

Received From: Mr. James R. Goldmann

Date of Receipt

07/29/99

Payment For Mr. James R. Goldmann 99/FA 1,000.00

CK 1,000.00

Total: 1,000.00

Receipt Tender Code Analysis (RTCA)

Overview

Use the Receipt Tender Code Analysis (RTCA) form to generate a report by receipt tender code that lists each cash receipt in the selected group that included the selected receipt tender code.

You identify the records that Colleague uses in the report through a saved list of IDs from the CASH.RCPTS file, through the selection options on the RTCA form, or through a combination of these options. In addition, you identify the range of cash receipt dates.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Report in Phantom Mode

The last form that is displayed when you run this report is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in phantom (background) mode.

Sample Form

RTCA-Receipt Tender Code Analysis

Start Date
Cutoff Date

Saved List Name

Receipt Tender Codes

AR Types

Deposit Types

Non-AR Receipt Codes

Additional Selection Criteria

Sample Report

Student System Sample Reports, July 31, 2009
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June 29 1999
10:42

RECEIPT TENDER CODE ANALYSIS

Page 1

CODE: \$\$\$ AR Paymnt/Thank You

ID	Name	Date	Receipt No	AR Type/Dep	Type/Non-AR	Receipt Code	Amount
0000089	Mr. Daniel Pickford	05/09/97	C00001_1	01	Student	Receivable	200.00
0000097	Mr. Gregory Smith	05/17/97	C00010_1	01	Student	Receivable	300.00
0001162	Mr. Jack Harris	11/05/98	DUPLICATE	01	Student	Receivable	25.00
0001329	Miss Maria Ross	12/04/98	000000025	06	Sponsor	Receivable	1,000.00
0001178	Mr. Klynt Brummet	12/04/98	000000026	01	Student	Receivable	1.00
0001252	Mr. Jonathan Ubler	12/04/98	000000027	01	Student	Receivable	1,000.00
0001178	Mr. Ryan Nystrom	12/04/98	000000028	01	Student	Receivable	5,000.00
0001178	Mr. Michael Ott	12/04/98	000000029	01	Student	Receivable	2,000.00
0001329	Mr. Christopher Parker	12/04/98	000000030	06	Sponsor	Receivable	955.00
0015672	Mrs. Kimberly Offerman	12/04/98	000000031	05	Third Party	Billing	1.00
0015672	Mr. James Goldmann	12/04/98	000000032	05	Third Party	Billing	10.00
0015672	Mr. Arnold Russel	12/04/98	000000033	05	Third Party	Billing	1.00
0015672	Mr. Scott Glass	12/04/98	000000034	05	Third Party	Billing	3.50
0015686	Dr. Jack Perry	12/04/98	000000035	01	Student	Receivable	112.50
0001329	Ms. Adam Dunlap	12/20/98	000000036	06	Sponsor	Receivable	428.00
0001329	Miss Chistine Wohl	12/20/98	000000036	06	Sponsor	Receivable	398.00
0001329	Mr. Michael Loughran	12/20/98	000000037	06	Sponsor	Receivable	40.00
0001329	Mr. John Robert Jung	12/20/98	000000037	06	Sponsor	Receivable	1,000.00
0001329	Ms. Sara Schrock	12/20/98	000000038	06	Sponsor	Receivable	500.00
0001329	Ms. Laura Gilmore	12/20/98	000000039	06	Sponsor	Receivable	600.00
0015727	Mr. Steven Wolfe	12/20/98	000000040	06	Sponsor	Receivable	200.00
0015727	Mr. Jacob Schrock	12/20/98	000000041	06	Sponsor	Receivable	200.00
0015727	Mr. Bradford Roberts	12/20/98	000000042	06	Sponsor	Receivable	300.00
0015727	Mr. Kyle Haydn	12/20/98	000000043	06	Sponsor	Receivable	300.00
0015739	Mr. Raymond Pryor	12/20/98	000000058	01	Student	Receivable	5.00
0001329	Miss Julia Ford	01/03/99	000000049	06	Sponsor	Receivable	20.00
0001329	Ms. Maria Glassey	01/03/99	000000050	06	Sponsor	Receivable	40.00
0001329	Ms. Barbara Markey	01/03/99	000000051	06	Sponsor	Receivable	100.00
0015728	Dr. Hugh Redford	01/03/99	000000052	06	Sponsor	Receivable	100.00
0015739	Mr. Johnathan Taylor	01/03/99	000000053	01	Student	Receivable	61.61
0015739	Mr. Matthew Riley	01/03/99	000000054	01	Student	Receivable	49.00
0002638	Mr. Patrcik Omar	01/03/99	000000055	01	Student	Receivable	25.00
0015739	Mrs. Kelly Brown	01/03/99	000000056	01	Student	Receivable	2.00
0015739	Mr. William Nelson	01/03/99	000000057	01	Student	Receivable	4.00
0015739	Mr. Harry Hendrickson	01/03/99	000000059	01	Student	Receivable	6.00
0015787	Mr. Jerry Patton	01/03/99	000000066	04	Misc.	Receivable	350.00
0015787	Mr. Brian Priest	01/03/99	000000067	04	Misc.	Receivable	350.00
0015787	Ms. Kathryn Harrison	01/03/99	000000068	01	Student	Receivable	350.00
0015787	Mr. Charles Kingston	01/03/99	000000069	01	Student	Receivable	350.00
0015788	Mr. Timothy Redd	01/03/99	000000070	02	Employees	Receivable	1,776.00
0015788	Mr. Richard Nanni	01/03/99	000000071	02	Employees	Receivable	1,776.00

Receipt Tender Total:

Grand Total: 13,987.61

Sample Report

CR Session Reconciliation Rpt (SSRC)

Overview

Use the Cash Receipt Session Reconciliation Report (SSRC) to generate a report of all cash receipts associated with one or more cash receipt sessions prior to reconciling that session. This report provides a detailed listing of each receipt processed in the selected sessions and provides session totals.

You can choose the batches that you include in the report by using a saved list of IDs from the RCPT.SESSIONS file, by using the selection options on the SSRC form, or a combination of these options.

After you verify that all receipts in the selected sessions were properly recorded, you can reconcile the sessions using the Cash Receipt Session Control (CRSC) form.

Sample Form

SSRC-CR Session Reconciliation Rpt

Start Date 

Cutoff Date 

Print Summary Yes

Saved List

Locations 1 2 3

Cashiers 1 2 3

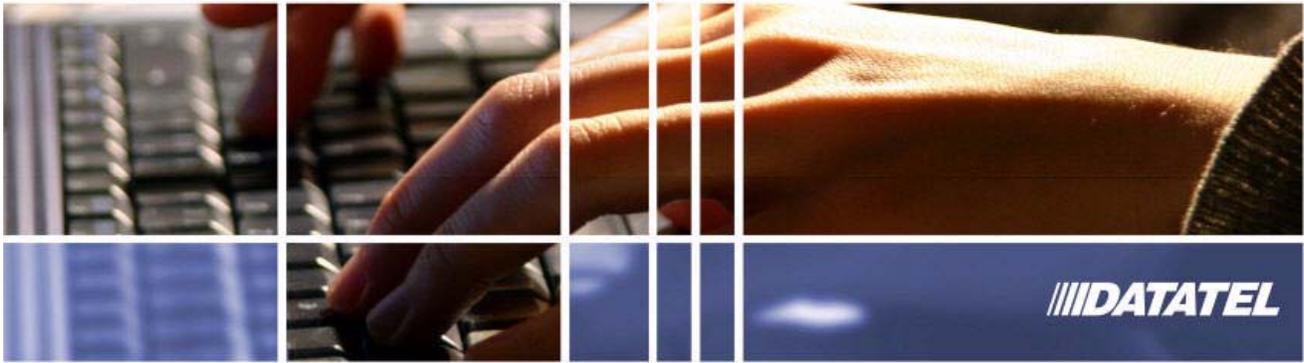
Sessions	Start Dt	St Time	End Dt	End Time	Status
<input type="text"/> 1					
<input type="text"/> 2					
<input type="text"/> 3					

Additional Selection Criteria No

Sample Report

Student System Sample Reports, July 31, 2009
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1999 June 29		CR SESSION RECONCILIATION RPT				Page 164		
10:49								
Session Number: 162						Location:		
Status.....: Closed						Cashier.: Ro		
Starting Cash.....: 0.00		Starting Cash.....: 0.00						
Actual End Balance: 999,999.99-		Amount Received....: 4,345.00						
Corrections.....: 999,999.99		Cash Returned.....: 1,283.00						
Adjusted Balance..: 3,062.00		Control End Balance: 3,062.00						
Batches:								
Number	Date	Status	Expected Items	Expected Amount	Actual Items	Amount Allocated	Amount Received	Change Returned
40	98/09/28	Closed	0	99.00-	0	0.00	99.00-	0.00
Total:			0	99.00-	0	0.00	99.00-	0.00
Non-Batch Cash Receipts:								
Number	Date	Payer ID/Name		Type	Amount Allocated	Amount Received	Change Returned	
000000426	09/28/99	0018296	Mr. Jonathan Davis		50.00	50.00	0.00	
000000427	09/28/99	0018296	Mr. Jonathan Davis	Reversing	50.00-	50.00-		
000000428	09/28/99	0018296	Mr. Jonathan Davis		5.00-	0.00	5.00	
000000429	09/28/99	0018287	Mr. Daniel DuPont		88.00	99.00	187.00	
000000430	09/28/99	0018287	Mr. Daniel DuPont	Reversing	88.00	88.00		
000000431	09/28/99	0018287	Mr. Daniel DuPont		2.00	2.00	0.00	
000000432	09/28/99	0018321	Mr. Michael Goldmann		990.00-	0.00	990.00	
000000433	09/28/99	0018324	Mr. Kevin Hopenwasser		900.00	900.00	0.00	
000000434	09/28/99	0018324	Mr. Kevin Hopenwasser		25.00	25.00	0.00	
000000419	09/28/99	0018297	Mr. Christopher Kruppa		4.00	4.00	0.00	
000000420	09/28/99	0018297	Mr. Christopher Kruppa		9.00	9.00	0.00	
000000421	09/28/99	0018297	Mr. Christopher Kruppa		10.00	10.00	0.00	
000000422	09/28/99	0018297	Mr. Christopher Kruppa	Reversing	10.00-	10.00-		
000000423	09/28/99	0018297	Mr. Christopher Kruppa		1,000.00	1,000.00	0.00	
000000394	09/28/99	0018288	Mr. James Moore		25.00	25.00	0.00	
000000395	09/28/99	0018288	Mr. James Moore	Reversing	25.00-	25.00-		
000000396	09/28/99	0001124	Mr. Brian Ott		9.00	9.00	0.00	
000000397	09/28/99	0001124	Mr. Brian Ott	Reversing	9.00-	9.00-		
000000398	09/28/99	0001124	Mr. Brian Ott		150.00	150.00	0.00	
000000399	09/28/99	0001124	Mr. Brian Ott	Reversing	150.00-	150.00-		
000000400	09/28/99	0016251	Mr. Jacob Patton		150.00	150.00	0.00	
000000401	09/28/99	0018289	Mr. Brian Parker		5.00	5.00	0.00	
000000402	09/28/99	0018289	Mr. Brian Parker	Reversing	5.00-	5.00-		
000000403	09/28/99	0018289	Mr. Brian Parker		1,000.00	1,000.00	0.00	
000000404	09/28/99	0018289	Mr. Brian Parker	Reversing	1,000.00-	1,000.00-		
					Session Total:	3,150.00	4,345.00	1,283.00
					Cashier Total:	3,062.00	4,345.00	1,283.00
					Date Total:	4,114.00	5,397.00	1,283.00



Student System Sample Reports

Curriculum Management Reports

Course Catalog (CCAT)

Overview

Use the Course Catalog (CCAT) form to specify the criteria you want used to prepare course catalog information for publication. The information is prepared based on the criteria to be used in a word processor.

The upper part of the form contains fields required for running the course catalog print. The Report Line Length field should be set to between 50 and 132. Use the Sort by Inst Hierarchy field to sort by school/division/department hierarchy.

Sample Form

The screenshot shows the 'CCAT-Course Catalog' form. It features a blue header bar. Below the header, there are two columns of red buttons for selection criteria: 'Report Line Length', 'Sort by Inst Hierarchy', 'Print Credits/CEUs/Both', 'Justify Credits Right', 'Print Session/Yearly Cycles', 'Print Contact Hours/Meth', 'Print Faculty Consent', 'Print Restrictions', 'Print Equate Codes', and 'Print Requisites Last'. A dropdown menu is visible next to 'Print Credits/CEUs/Both'. Below these buttons is a 'Saved List Name' text field. The lower section contains a list of filters with numeric input boxes and arrow buttons: 'Academic Levels', 'Schools', 'Divisions', 'Departments', 'Locations', 'Subjects', 'Session Cycles', 'Yearly Cycles', and 'Terms Offered'. At the bottom, there is an 'Additional Selection Criteria' field with a red 'No' button.

Sample Report

06/24/99
04:56PM

Course Catalog

Page 1

School.....:
Division..: Div Of Humanities
Department: HIST

HIST-101 HISTORY OF WESTERN CIVIL. I (3.00 cr.)
(All Terms, All Years)

A Brief Examination Of The Cultural Contributions Of The Ancient Middle East Followed By A Survey Of The Classical Civilizations Of Greece And Rome. Lecture (45.00).

HIST-102 HISTORY OF WESTERN CIVIL. II (3.00 cr.)
(All Terms)

Continuation Of Western Civ 101 With A Consideration Of The Changes Brought By The Intellectual And Scientific Revolution. Lecture (45.00).

HIST-142 NAT AMERICANS - FINGER LAKES (3.00 cr.)
(Fall Only, Odd Years)

An introduction to the role played by Native Americans in the Finger Lakes Region. The local orientation will be treated through an interdisciplinary methodology with multi-media presentations (slides, movies, sound, etc.) combined with establishing lectures for each segment. Lecture (45.00).

HIST-201 UNITED STATES HISTORY (3.00 cr.)
(All Terms)

An examination of the forces which have shaped american history from the earliest colonial settlements to the civil war. Lecture (45.00).

HIST-202 UNITED STATES HISTORY (3.00 cr.)
(All Terms)

An introductory analysis of the factors which have defined our history from the reconstruction after the civil war to america's position in the 20th century. Lecture (45.00).

Course List (CRSL)

Overview

Use the Course List (CRSL) process run a report either a summary list or detailed list of selected courses. You can specify on the CRSL form which type of list you want.

For the summary list report, you can specify whether to print requisites, or sort by course name only or by institution hierarchy (school, division, department) and course name. For the latter, if a course has more than one department, the course name will be printed only once under the first department.

The detailed list report is printed in course name order with a page break on each course.

Several fields on this form allow you to limit the course list to courses meeting certain criteria. You can specify limiting dates in two places:

- If you specify dates in the Course Date Begin and End fields, the course list will be limited to courses with start and end dates within that time period. Any course which is offered before the begin date or after the end date will not be on the list.
- If you specify one or more terms in the Terms Offered field, the course list will be limited to courses offered during those terms.

Sample Form

CRSL-Course List

Summary Format

Print Requisites

Sort by Institution Hierarchy

Saved List Name

Begin End

Course Date

Schools 1

Divisions 1

Departments 1

Subjects 1

2

Session Cycles 1

Yearly Cycles 1

Terms Offered 1

2

Additional Selection Criteria No

Sample Report

June 24 1999
17:01

COURSE LIST REPORT

Page 1

School....:
Division...: Div Of Humanities
Department: ENGL

Course Name	Title/	Depts	Credit Type	Min/Max Credits	CEUs	Faculty Consent	Session Cycle	Yearly Cycle	Equip	Qty	Start/End Date	Status
ENGL-101	ENGLISH COMPOSITION	ENGL	1	3.00		No	A	A			09/02/98	A
ENGL-110	BUSINESS COMMUNICATIONS	ENGL	1	3.00		Yes	A	A			09/02/98	A
ENGL-112	INTRODUCTION TO MODERN POETRY	ENGL	1	2.00		No	A	A			09/02/98	A
ENGL-121	INTRODUCTION TO SHAKESPEARE	ENGL	1	3.00		Yes	A	A			02/03/99	A
ENGL-142	WRITING NON-FICTION	ENGL	1	3.00	2.00	No	A	A			02/03/99	A
ENGL-175	LITERARY INTERPRETATIONS	ENGL	1	3.00		No	A	A			02/03/99	A
ENGL-201	ULTRA MODERN AMERICAN ENGLISH	ENGL	1	3.00		No	A	O			02/03/99	A
ENGL-208	TWENTIETH CENTURY AM. FICTION	ENGL	1	3.00		No					02/03/99	A
ENGL-220	NATIVE AMERICAN LITERATURE	ENGL	1	3.00		No	A	A			02/03/99	A
ENGL-256	AFRICAN-AMERICAN MODERN LIT.	ENGL	1	3.00		Yes	A	A			02/03/99	A
ENGL-342	LITERATURE OF THE MIDDLE AGES	ENGL	1	2.00	2.00	No	A	A			02/03/99	A
ENGL-351	BRITISH LITERATURE TO 1600	ENGL	1	3.00		Yes	A	A			09/01/99	A
ENGL-352	BRITISH LITERATURE TO 1900	ENGL	1	3.00		Yes	A	A			09/01/99	A
ENGL-360	WOMEN AND LITERATURE	ENGL	1	3.00		Yes	A	A			09/01/99	A
ENGL-378	SHAKESPEARE'S PLAYS	ENGL	1	3.00		No	A	O			09/01/99	A
ENGL-390	CHAUCER'S LITERATURE	ENGL	1	3.00		No	A	A			09/01/99	A
ENGL-401	ADVANCED BRITISH POETRY	ENGL	1	3.00		Yes	A	A			09/01/99	A
ENGL-421	BRITISH CHILDREN'S STORIES	ENGL	1	4.00		No	A	O			09/01/99	A

Classroom Usage Worksheet (CRUW)

Overview

Use the Classroom Usage Worksheet (CRUW) form to set up print options for your classroom usage worksheet. You may select from one of the following print options:

- U (Show Usage) to show classroom usage for a particular time and day. For example, if a class is scheduled from 8 to 10 on Thursday, then the class displays in the Thursday column in the 8, 8:30, 9, and 9:30 time slots. If no building is selected, then all buildings will be chosen. If a building is selected and not a room, then all rooms for that building will be chosen regardless of type.
- R (Room Identification) to show room usage only at the very top in the header. The rest of the worksheet remains blank, allowing for handwritten entry into the worksheet.
- B (Blank) to print a blank worksheet.

Sample Form

CRUW-Classroom Usage Worksheet

Print Option

Number of Blank Forms

Saved List Name

Begin End

Week Of (Date)

Room Usages

Locations

Building Types

Buildings

Buildings/Rooms

Additional Selection Criteria

Sample Report

1999 June 24 09:14		Classroom Usage Worksheet						Page 1
Building : CC College Center Room.....: 101		Capacity.: 50 Room Type: 01 Location.: MC Main Campus						
	Monday 01/04/99	Tuesday 01/05/99	Wednesday 01/06/99	Thursday 01/07/99	Friday 01/08/99	Saturday 01/09/99	Sunday 01/10/99	
07:00AM	ENGL-101		ENGL-101					
07:30AM	ENGL-101		ENGL-101					
08:00AM	ENGL-101		ENGL-101					
08:30AM								
09:00AM	HIST-201		HIST-201		HIST-201			
09:30AM	HIST-201		HIST-201		HIST-201			
10:00AM								
10:30AM								
11:00AM		ENGL-351		ENGL-351				
11:30AM		ENGL-351		ENGL-351				
12:00PM		ENGL-351		ENGL-351				
12:30PM								
01:00PM		HIST-202		HIST-202		HIST-202		
01:30PM		HIST-202		HIST-202		HIST-202		

Section Availability Report (CSAR)

Overview

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

You can include open sections and/or include closed sections. The report indicates the following:

- instructors
- scheduled meeting places and times
- room capacity
- section minimum enrollment and capacity
- figures for the used seats
- waitlist count
- available seats in each section

Sample Form

CSAR-Section Availability Report

Print Open Sections Yes

Print Closed Sections Yes

Print Primary Only No

Print by Loc or Fac Location

Print Global or Local Global

Include Printed Comments

Name/Address Hierarchy

Saved List Name

Sec Dates Begin/End

Terms 1

Subjects 1

Courses 1

Course Sections 1

Synonyms 1

Departments 1

Divisions 1

Schools 1

Locations 1

Faculty Members 1

Additional Selection Criteria No

Sample Report

June 24 1999
12:20

SECTION AVAILABILITY REPORT
OPEN AND CLOSED SECTIONS BY LOCATION
GLOBAL

Page 1

LOCATION:
TERM : 99/WI

Course Section/ Synonym	Title/ Faculty Members	Room/ Instr Methods	Days	Start Time/Date End Time/Date	Room Cap	Credits/ Sect CEU Min	Sect Cap	Used	Wait	Aval
CIS-100-01 0145	INTRO TO INFOR SYS	LEC		12/20/98 01/19/99		3.00	0	15	1	014
CIS-99-01 0049	INTRO TO C+	CARV 03 LEC	TTH	03:00PM 12/20/98 04:55PM 01/19/99		45 3.00	29	35	35	50
BUS-99-02 0050	BUSINESS COMMUNICATIONS	BU 300	MWF	05:00PM 12/20/98		60 3.00	23	55	40	015
BUS-200-03 0087	INTRO TO MARKETING	BU 200	MW	9:00 AM 12/20/98		125 3.00			2	0
GXDS-99/WI-04 0088	Gxd's 99 Winter Course					3.00		1	0	
GXDS-CE1-01 0055	Gxds Contin Ed					3.00 3.00		2	0	
GXDS-CE1-03 0056	Gxds Contin Ed					3.00 3.00		2	0	
0										
15	60	0	14							

Course Space Utilization (CSPU)

Overview

Use the Course Space Utilization (CSPU) form to generate a report by building and room. The information included on this report is:

- section schedules
- room capacity
- section enrollment
- percent of section enrollment capacity used

Sample Form

The screenshot shows a web form titled "CSPU-Course Space Utilization". The form has a blue header bar. Below the header, there are two checkboxes: "Sort by Day/Time" (checked) and "Conflict Checking" (unchecked). A text input field for "Saved List Name" is present. The "Section Date" section includes "Begin" and "End" date pickers. There are three sets of dropdown menus for "Terms", "Locations", and "Room Types", each with a "1" and "2" option. The "Building" section has two dropdown menus, and the "Room" section has one. At the bottom, there is a checkbox for "Additional Selection Criteria" which is checked.

Sample Report

June 24 1999		COURSE SPACE UTILIZATION					
Page 1		99/FA					
17:23		Building:CARV Carver					
Room	Room Capacity	Course Section	Xlist Enroll	Pct Used Global	Sect Enroll	Pct Used Local	Schedule
-----	-----	-----	-----	-----	-----	-----	-----
100	50	GEO-101-235			3	6	M 09:00AM-11:00AM 09/01/99-12/19/99 W LEC
100	50	GEO-101-235			3	6	M 01:00PM-03:00PM 09/01/99-12/19/99 W LAB
100	50	ART-100-01			3	6	T 09:00PM-11:00PM 09/01/99-12/19/99 W LEC
100	50	ART-100-07			1	2	T 09:00AM-11:00AM 09/01/99-12/19/99 W LEC
100	50	ART-100-01			3	6	T 10:00AM-11:00AM 09/01/99-12/19/99 W STD
100	50	ART-100-07			1	2	T 02:00PM-04:00PM 09/01/99-12/19/99 W STD
100	50	ART-100-01			3	6	T 04:00PM-05:00PM 09/01/99-12/19/99 W LAB
100	50	ART-100-07			1	2	T 04:00PM-05:00PM 09/01/99-12/19/99 W LAB

Course Section Schedule (CSSC)

Overview

Use the Course Section Schedule (CSSC) form to establish criteria to report on the schedule of course sections.

Enter your report options. The Sort Selection and the Print Requisites fields are required. The Sort Selection field should accept:

- HS (display "Hierarchy and Section")
- DS (display "Department and Synonym")
- SE (display "Section")
- SS (display "Subject and Synonym")
- D (display "Day and Time")

If you enter a term as the begin date, enter the term start date and the term end date. If you enter a term as the end date, enter just the end date. You can leave either the begin or the end date blank.

If you enter a begin date, only select sections whose start date is greater than or equal to this date. If you enter an end date, only select sections whose end date is less than or equal to this date.

Either meeting begin or end time may be left blank. If a begin time is entered, select all sections that begin on or after this time. If an end time is entered, select all sections that end on or before this time.

Sample Form

CSSC-Course Section Schedule

Sort Selection
Block Type

Print Requisites
Include Printed Comments

Saved List Name

Begin End

Section Dates

Meeting Times

Meeting Day

Subjects

Courses

Course Sections

Terms

Departments

Divisions

Faculty Members

Locations

Instructional Methods

Addnl Selection Criteria

Sample Report

07/24/99
Page 1
05:25PM

COURSE SECTION SCHEDULE

99/FA
Section Name Sort

Course Section/ Synonym CEUs	Title/ Faculty Members	Instr Meth	Room	Days	----Start/End----	Date	Freq	Credits
-----	-----	----	-----	----	-----	-----	----	----
ACC-15B-1 0174	Writing About Language	LEC	CARV 102	TTH	10:00AM 12:00AM	09/01/99 12/31/99	Week	3.00
ART-060-A 0002	History of Western Art	LEC	DPNT 202	MWF	04:00PM 06:00PM	09/01/99 12/31/99	Week	3.00
ART-100-01 0148	Remedial Art	LEC	CARV 100	TTH	09:00AM 11:00AM	09/01/99 12/19/99	Week	3.00
		STD	CARV 100	TTH	02:00PM 04:00PM	09/01/99 12/19/99	Week	
		LAB	CARV 100	TTH	04:00PM 05:00PM	09/01/99 12/19/99	Week	
ART-100-07 0151	Art	LEC	CARV 100	TTH	09:00AM 11:00AM	09/01/99 12/19/99	Week	3.00-6.00
		STD	CARV 100	TTH	02:00PM 04:00PM	09/01/99 12/19/99	Week	
		LAB	CARV 100	TTH	04:00PM 05:00PM	09/01/99 12/19/99	Week	
BIO-421L-01 0116	Biology Under a Microscope	LEC	100	TTH	05:00PM 07:00PM	09/01/99 12/19/99	Week	3.00-6.00
BIOL-101-1 0120	Principles of Biology	LEC	FORD 103	M	09:00AM 10:00AM	09/01/99 12/19/99	Week	3.00
		LAB		M	11:00AM	09/01/99	Week	

Section Prerequisite Roster (SPRT)

Overview

Use the Section Prerequisite Roster (SPRT) form to generate a section roster that indicates the status of each student with regard to completion of the prerequisites. This report is similar to the Section Roster (SROS) report but with the Academic Level Taken, Academic program, Admit Status, and Anticipated Completion Date fields.

Sample Form

The screenshot shows the 'SPRT-Section Prerequisite Roster' form. It features a blue header bar. Below the header, there are several input fields and buttons for configuration. The form is organized into two columns of options. The first column includes 'SSN or ID' (set to 'ID'), 'Double-space' (set to 'No'), 'Separate Cross-List' (set to 'Yes'), and 'Print Cross-List Ref' (empty). The second column includes 'Print Special Needs' (set to 'Yes'), 'Print Dropped/Withdrawn' (set to 'No'), 'Print Waitlisted' (set to 'No'), and 'Print Phone Types' (set to '1'). Below these options is a 'Saved List Name' text box. Further down, there are 'Begin' and 'End' date fields with calendar icons. A list of selection criteria follows: 'Terms', 'Faculty Members', 'Subjects', 'Courses', 'Sections', and 'Locations', each with a dropdown menu set to '1'. At the bottom, there is an 'Additional Selection Criteria' option set to 'No'.

SSN or ID	ID	Print Special Needs	Yes
Double-space	No	Print Dropped/Withdrawn	No
Separate Cross-List	Yes	Print Waitlisted	No
Print Cross-List Ref		Print Phone Types	1

Saved List Name:

Section Date: Begin End

Terms:

Faculty Members:

Subjects:

Courses:

Sections:

Locations:

Additional Selection Criteria: No

Sample Report

June 24 1999
 Page 2
 17:29

SECTION PREREQUISITE ROSTER

99/FA

Section.....: CIS-100-250 INTRO TO INFOR SYS
 Instructors: TBA

		----- Schedule -----							
		TBA							
ID	Student Name	Spec Credits/ Need CEUs	Class	Rpt Crs	Acad Credit P/A	Status	Add/Drop Withdraw/Drop Date	Grade	Prerequisite Status
0018836	Mr. Brett Feld	3.00 cr		Yes		New	05/07/99		C
0015949	Mr. Andrew M. Laforge	3.00 cr				New	06/01/99		C
0015954	Mr. Charles T. Liting	3.00 cr				New	06/01/99		P
0015953	Mr. Allen E. Lothrop	3.00 cr				New	06/01/99		C
0000001	Mr. Kenneth J. Smith	3.00 cr	FR	Yes		New	05/10/99		C

5 Students currently enrolled

Prerequisite Status

N = Not Started

I = In progress (at least part of the prerequisite has been completed)

P = Pending (at least one part of the prerequisite has not yet been completed, but all parts have at least been started)

C = Complete

Null value indicates no prerequisite associated to course section

Section Roster (SROS)

Overview

Use the Section Roster (SROS) form to produce rosters for course sections. This roster includes Academic Level taken, Academic Program, Admit Status, and Anticipation Completion Date fields for each student, but does not indicate the status of a student with regard to completing the prerequisites.

Sample Form

The screenshot shows the 'SROS-Section Roster' form with the following fields and options:

- SSN or ID: ID
- Double-space: No
- Separate Cross-List: Yes
- Print Cross-List Ref:
- Print Special Needs: Yes
- Print Dropped/Withdrawn: No
- Print Waitlisted: No
- Print Phone Types: 1
- Saved List Name:
- Section Date:
- Terms: 1
- Faculty Members: 1
- Subjects: 1
- Courses: 1
- Sections: 1
- Locations: 1
- Additional Selection Criteria: No

Sample Report

June 24 1999
Page 1
17:36

SECTION ROSTER

99/FA - Main Campus

Section.....: ART-060-A History of Western Art
Instructors: TBA

----- Schedule -----
09/01/9912/31/99 DPNT 202 LEC MWF 04:00PM 06:00PM

ID	Student Name	Spec Need	Credits/CEUs	Acad Level Taken	Class	Acad Program	Ant Admit Stat	Cmpl Date	Rpt Cr/ P/A	Acad Cr Stat	Add/Drop Withdraw Date	Drop Gr
0000714	Gerbers, Chris A.		3.00 cr	UG	FR		New	03/02/99				
0018798	Hill, Nicole		3.00 cr	UG		AA.ACCT	New	04/08/99				
0015949	Laforge, Andrew M.		3.00 cr	UG		BA.ACCT	New	06/01/99				
0015954	Liting, Kevin T.		3.00 cr	UG		BA.ACCT	New	06/01/99				
0015953	Lottiun, Janice E.		3.00 cr	UG		BA.ENGL	New	06/01/99				
0018719	Martin, Charles		3.00 cr	UG		BA.ENGL	New	03/02/99				
0000030	Robinson, Laura E.		3.00 cr	UG	FR	MGMT	New	02/01/99				
0018712	Saint, Jill		3.00 cr	UG		BA.ENGL	New	03/03/99				
								03/02/99				
0018710	Vadley, Sally		3.00 cr	UG		BA.ENGL	New	03/02/99				

9 Students currently enrolled

Course Waitlist (WAIT)

Overview

Use the Course Waitlist (WAIT) form to generate a report of students that are on a waitlist for a course by specifying the report options.

You can choose which courses to include in the report by using a saved list of records from the WAIT.LIST file, by using the selection options on the WAIT form, or with a combination of these options.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.

Sample Form

WAIT - Course Waitlist

Phone Type Print Address **Yes**

Print Acad Pgm/Class **Yes** Name/Address Hierarchy

Saved List Name

Waitlist Rating

Begin End

Courses

Sections

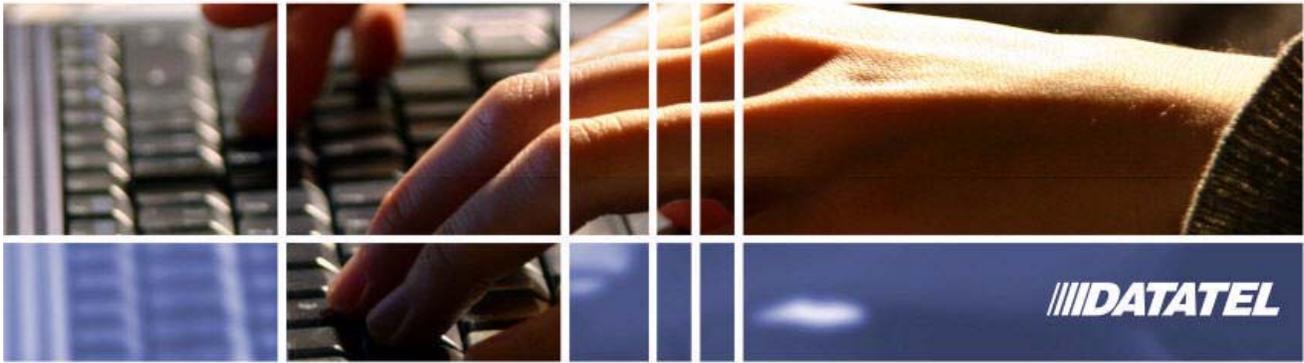
Terms

Pref Locations

Additional Selection Criteria **No**

Sample Report

June 24 1999		COURSE WAITLIST								
Page 1		MATH-WL								
17:37		99/FA								
ID	Name/Address Academic Program	Telephone	Class	Pref Sect	Pref Loc	Rtg	Waitlist Date	Waitlist Time	Stat	Date
0018873	Nicole Torkel 1234 York Street Southtown, VA 22033 AA.ACCT	928-1234		01		10	05/17/99	12:45PM	E	05/17/99
0018874	Sara Anderson 987 Main Street Springfield, VA 22033 AA.ACCT	976-1209		01		10	05/17/99	01:00PM	D	05/17/99
0018875	Sean Ryan 7326 Old Tavern Rd Alexandria, VA 22333 AA.ACCT	746-9243		01		10	05/17/99	01:14PM	D	05/17/99
0018876	Amanda Reed 9023 St. Joe Ave Fairfax, VA 22033 AA.ACCT	456-2389		01		10	05/17/99	01:21PM	E	05/17/99
0018880	Chris Miller 510 North Blvd Springfield, VA 23423 AA.ACCT	385-7170		01		10	05/18/99	11:27AM	E	05/18/99
5 students waitlisted for this course										



Student System Sample Reports

Financial Aid Reports

Award Letters (ALTR)

Overview

Use the Award Letters (ALTR) report to print an award letter for a financial aid applicant. To select applicants for whom you want to print award letters, enter the name of a saved list of student IDs (Saved List Name), an award code (Awards), or a list of individual student IDs (FA Applicants).

You can elect to print award letters for applicants for whom an award letter has not been previously printed (Not Previously Printed) or for whom an award letter has been modified since it was last printed (Modified Since Printed). These fields are required. You must enter [Y] or [N].

If you want to further narrow your selection of applicants, enter [Y] in the Additional Selection Criteria field. If you enter "Y" in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update or finish from the ALTR form. Use the Additional Selection Criteria form to construct selection criteria based on information in the Summary Award file (SA.ACYR).

You may select a custom award letter by entering in FA Award Letter ID in the Custom Award Letter field. The award letter ID tells Colleague which award letter print subroutine to use when printing award letters. The award letter print subroutine is called by the award letter print program and tells Colleague the content and format of the award letter. To define an FA award letter ID, use the FA Award Letter Definition (FALD) form.

The Custom Award Letter field is optional. If you do not enter an FA Award Letter ID, Colleague uses the default award letter print subroutine, S.PRINT.AWARD.LETTERS, provided with Colleague. This subroutine can be modified to create multiple award letter versions, such as an award letter for undergraduate students and an award letter for graduate students. Your system administrator can assist you in the creation of additional award letter print subroutines.

To limit the content of the award letter, you can use the Include [Action Category] fields to include, in an award letter, awards with action codes that belong to a certain action category, such as the Pending action category. These fields are required. You must enter [Y] or [N].

You must indicate the source of the name and address to be used on the award letter by selecting a name/address hierarchy code (Name/Address Hierarchy). The name/address hierarchy code tells Colleague which name and address information should be used to generate the applicant's name and address on the award letter. This field is required. You must select a name/address hierarchy code.

You have the option of entering the date that the award letter must be returned (Return Letter By) and a communication code for updating the Communication Management (CM) module (Comm Code). These fields are optional. However, if you enter a communication code, you must also enter a communication status in the field to the right of the Comm Code field (Status).

Sample Form

ALTR-Award Letters

Academic Year 2005

Award Letters To Print

Return Letter By

Comm Code/Status

Name/Address Hierarchy [REDACTED]

Include Estimated [REDACTED]

Include Pending [REDACTED]

Include Accepted [REDACTED]

Include Rejected [REDACTED]

Include Denied [REDACTED]

Custom Award Letter

Saved List Name

Awards	Code	Description
	<input type="text" value="1"/>	<input type="text" value=""/>
	<input type="text" value="2"/>	<input type="text" value=""/>

FA Applicants

Other Selection Criteria No

Sample Report

10 Main St. 07/06/99
Fairfax, VA 20121

	TOTAL	99/FA	00/WI
Stafford Loan	4440.00	1110.00	3330.00
Y_N_			

Award Eligibility Verification (AEV)

Overview

Use the Award Eligibility Verification (AEV) report to identify applicants who have received an award for which they are not qualified due to restrictions that have been defined for specific funds. Eligibility criteria are defined for an award on the Award Eligibility Criteria (AEC) form.

For example, certain awards may be restricted to applicants who have a specific class standing, program, major, grade point average, or other quality. The AEV report uses the criteria you enter on this form to identify recipients of any given award who are unqualified for that award.

The AEV process prints a separate report for each award you enter in the Awards field. Each report lists the ID number, name, social security number, and program of all applicants unqualified for that award.

Sample Form

AEV-Award Eligibility Verif

Academic Year **2005**
Award Period

Saved List Name

Awards

Code	Description
1 <input type="text"/>	<input type="text"/>
2 <input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>

FA Applicants

ID	Student
1 <input type="text"/>	<input type="text"/>
2 <input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>
4 <input type="text"/>	<input type="text"/>
5 <input type="text"/>	<input type="text"/>
6 <input type="text"/>	<input type="text"/>

Additional Selection Criteria **No**

Sample Report

June 29 1999			AWARD ELIG VERIF REPORT					Page 1	
Award Period									
ID	SSN	Name	Awd Per Award	Amt Per Amount	Act	Elig Type	Rule ID	Message	
0018395	123-12-1234	Mr. James Parish	AVD	600.00	A	Award	FAMUSIC	The data record did not pass the criteria specified	
0015949	129-34-5382	Mr. James Chutka	SEOG	400.00	A	Award	PROGRAM	This Students Program does not meet requirements	
0015949	129-34-5382	Mr. James Chutka	SEOG	400.00	A	Award	PROGRAM	This Students Program does not meet requirements	
0015953	236-01-0008	Ms Deanne Curtis	SEOG	400.00	A	Award	PROGRAM	This Students Program does not meet requirements	
0015953	236-01-0008	Ms Deanne Curtis	FWS	200.00	P	Award	FWS	The data record did not pass the criteria specified	
0015954	236-01-0010	Ms Rhonda Belton	SEOG	400.00	A	Award	PROGRAM	This Students Program does not meet requirements	
0015954	236-01-0010	Ms Rhonda Belton	SEOG	400.00	A	Award	PROGRAM	This Students Program does not meet requirements	

Attend Pattern Mismatch Rep (APCR)

Overview

Use the Attend Pattern Mismatch Report (APCR) report to compare financial aid information with registration information. The report compares information for an award period you specify and prints only discrepancies. The report uses information from SA.TERMS in the SA.ACYR file; students must have financial aid awards on record for their information to appear on the report.

If no discrepancies exist for a particular comparison, that column is left off the report. The title of the report indicates the comparisons you have specified.

The report is capable of producing the following columns:

- **FA Enroll/REG Credits**--This column compares the student's academic load from the STTR.STUDENT.LOAD data element of the student's STUDENT.TERMS record (as determined by the subroutine SA.FA.REG.CREDITS and specified in the Academic Load field on the Additional Student Term Info [ASTR] form in the Academic Records [AC] module) with the student's full-time/part-time status for the award period from the SA.TERM.FP.STATUS data element in the SA.ACYR file (as specified, for standard attendance patterns, in the Enroll Status field in the Award Period group on the Attendance Pattern Definition [ATPC] form and, for the individual student's attendance pattern, in the FA Enr[ollment] field in the Award Period group on the Student Attendance Pattern [SATP] form). If the FA F/P status does not match the student's academic load, the student is included on the report.
- **Credits: FA/REG** --This column compares the student's FA registration credits from the SA.ATP.DEF.CREDITS data element in the SA.ACYR file (as specified, for standard attendance patterns, in the FA Cr[edit]s field in the Award Period group on the Attendance Pattern Definition [ATPC] form and, for the individual student's attendance pattern, in the FA Cr[edit]s field in the Award Period group on the Student Attendance Pattern [SATP] form). with the student's registration credits from the STC.CRED data element of the student's STUDENT.ACAD.CRED record (as determined by the subroutine SA.FA.REG.CREDITS and specified in the Reg[istered] Credits field on the Student Terms Summary [STRS] form in the Academic

Records [AC] module) If the student's FA credits value does not match the AC credits value, the student is included on the report.

- Res[idency]: FA/REG --This column compares the student's residency for the award period from the SA.TERM.RES data element in the SA.ACYR file (as specified, for standard attendance patterns, in the Exp[ected] Res[idency] field on the Attendance Pattern Definition [ATPC] form and, for the individual student's attendance pattern, in the FA Res[idency] field on the Student Attendance Pattern [SATP] form) with the student's residency from the STU.RESIDENCY.STATUS data element of the student's STUDENT record (as specified in the Residency St[atus]/Date field on the Addl Student Profile Info [ASPR] form in the Academic Records [AC] module). If the student's FA residency value does not match the AC residency value, the student is included on the report.
- Loc[ation]:FA/REG This column compares the student's FA location as specified in the Award Period FA Loc[ation] field on the Student Attendance Pattern (SATP) form to determine FA location. To determine the REG location for the REG column, this report calls the S.GET.STU.HOME.LOCATION subroutine. The S.GET.STU.HOME.LOCATION subroutine looks to the STUDENTS file and returns a STU.HOME.LOCATION value that falls within the award period's start and end date range. If the student's FA location value does not match the REG location value, the student is included on the report.
- Off[ice]: FA/REG This column compares the FA office based on the student's FA location with the FA office associated with the student's REG location. To determine the FA office, this report must first determine the student's FA location via the Award Period FA Loc field on the Student Attendance Pattern (SATP) form. The S.GET.FA.OFFICE subroutine is called to determine the FA office using the calculated FA location. S.GET.FA.OFFICE reads the FA.LOCATIONS file and examines the FALOC.FA.OFFICE field. If this field is blank, the subroutine extracts the FA office from the FSP.MAIN.FA.OFFICE field in the FA.SYS.PARAMS record in ST.PARMS. To determine the REG office, APCR must first determine the student's REG location. It calls the S.GET.STU.HOME.LOCATION subroutine to return a REG location. It then calls the S.GET.FA.OFFICE subroutine to determine the FA office associated with the REG location. S.GET.FA.OFFICE examines both the FALOC.FA.OFFICE field and FSP.MAIN.FA.OFFICE fields to determine the FA office associated to the REG location. If the FA Office associated to the REG location does not match the FA Office associated to the FA location from the attendance pattern, then the student is included on the report.

If the report is unable to make a comparison, the missing value is indicated.

The report allows you to specify both additional selection criteria and sort definitions.

Sample Form

APCR-Attend Pattern Mismatch Rep

Academic year Min Credits 
Award Period Max Credits 
Enrollment
Credits
Residency
Location
Office

Saved List Name

Students

ID	Student
<input type="text" value="1"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>
<input type="text" value="3"/>	<input type="text"/>
<input type="text" value="4"/>	<input type="text"/>
<input type="text" value="5"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

Time 14:53		ATTENDANCE PATTERN MISMATCH REPORT										Page 1	
YEAR: 1999		AWARD PERIOD: 99/FA		COMPARING: RESIDENCY, CREDITS, ENROLL, LOCATION, OFFICE									
ID	SSN	NAME	FA	REG	FA	REG	ENR	CREDITS	FA	REG	FA	REG	MESSAGES
0000178	234-09-6513	Richards, Janice	R	I	12.00			F					MC
0000793	090-09-0909	Cooke, Greg	R	I	12.00			F					DT
0001204	053-70-5243	Krist, James	R		12.00			F					
0001806	292-92-9999	Parrish, James M	R	I	12.00			F					POR
0001838	125-76-9812	Narcum, Bridget M	R	I	12.00	3.00		F	3.00				MC
0002114	312-54-6699	Chutka, James J.	R	I	12.00	3.00		F	3.00				MC
0002679	910-09-0889	Astrosky, Elise M	R	I	12.00			F					
0002722	893-73-0983	Scott, Gillian Ta	R	I	12.00	14.00							
0002727	832-90-1245	Hemming, Matthew	R	I	12.00	14.00				MC			
0002807	292-99-2929	Johnson, Tonya	R	I	12.00			F					MC
0002808	393-99-9933	Belton, Rhonda	R	I	12.00			F					MC
0002811	987-12-3456	Curtis, Deanne L.	R	I	12.00			F					MC
0002812	551-43-2222	Driscoll, Ronald	R	I	12.00			F					MC

Awards Register (AWDR)

Overview

Use the Awards Register (AWDR) report to obtain a detail and summary report of the awards that have been entered for a specific academic year. The register may be printed for selected awards or for selected applicants, through a saved list. You also have the option of printing the summary report without the detail information.

The detail portion of the register is sorted by name and lists all awards for each applicant. The detail includes the applicant's ID number and name, class, alien status, original enrollment status, the code description and total award amount, the award period distribution amounts, and the action status for each award period. Subtotals are provided for the total awarded amount and total accepted amount for each applicant.

Summary figures are provided for each general ledger control account and each award. The total amount awarded for the year, total amount accepted for the year, total number of awards, and the award period totals for awarded and accepted amounts will print for each category.

Sample Form

AWDR-Awards Register

Academic Year **2005**
Summary Only

Saved List Name

Awards

	Code	Description
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>

Additional Selection Criteria **No**

Sample Summary Report

07/13/99 SUMMARY BY GENERAL LEDGER NBR FOR ACADEMIC YEAR 1999 Page 1

CONTROL ACCOUNT GL NUMBER	AR. TYPE DESCRIPTION	AWARDED ACCEPTED	NBR	PERIOD 1	PERIOD 2	PERIOD 3	PERIOD 4	PERIOD 5	PERIOD 6	PERIOD 7
10-0000-13020-01	Student Receivable	50775.00	26	99/FA 25293.00	2000/SP 25282.00	2000/S1 400.00				
		500.00		250.00	250.00	0.00				

07/13/99 SUMMARY BY AWARD FOR ACADEMIC YEAR 1999 Page 2

CODE	DESCRIPTION	AWARDED ACCEPTED	NBR	PERIOD 1	PERIOD 2	PERIOD 3	PERIOD 4	PERIOD 5	PERIOD 6	PERIOD 7
ACAD	Academic Scholarship	500.00	1	99/FA 250.00	2000/SP 250.00	2000/S1 0.00	0.00			
		500.00		250.00	250.00	0.00	0.00			
FWS	Federal Work Study	1200.00	1	99/FA 600.00	2000/SP 600.00	2000/S1 0.00				
		0.00		0.00	0.00	0.00				
GARDN	Gardner Scholarship	500.00	1	99/FA 250.00	2000/SP 250.00	2000/S1 0.00				
		0.00		0.00	0.00	0.00				
LEGAC	Legacy Scholarship	2000.00	2	99/FA 1000.00	2000/SP 1000.00	2000/S1 0.00				
		0.00		0.00	0.00	0.00				
PELL	Federal Pell Grant Program	21950.00	8	99/FA 10979.00	2000/SP 10971.00	2000/S1 0.00				
		0.00		0.00	0.00	0.00				
SEOG	Federal Suppl. Educ Opportunit	2200.00	5	99/FA 1000.00	2000/SP 1000.00	2000/S1 200.00				
		0.00		0.00	0.00	0.00				
STAFE	Stafford Loan Electronic	23625.00	9	99/FA 11814.00	2000/SP 11811.00	2000/S1 200.00				
		0.00		0.00	0.00	0.00				

Sample Detail Report

07/13/99

FINANCIAL AID AWARDS REGISTER FOR ACADEMIC YEAR 1999

Page 1

AWARD	DESCRIPTION	AMOUNT AWARDED	PERIOD 1	PERIOD 2	PERIOD 3	PERIOD 4	PERIOD 5	PERIOD 6	PERIOD 7
0002115	Adams, Julie S.		135-76-3399	TOTAL AR	BALANCE:	4,250.00			
			99/FA	2000/SP	2000/S1				
	T O T A L	AWARDED: 800.00							
		ACCEPTED: 800.00	200.00	200.00	400.00				
0001092	Cooke, Greg M		576-29-9876	TOTAL AR	BALANCE:	6,542.60			
			99/FA	2000/SP	2000/S1				
	T O T A L	AWARDED: 900.00							
		ACCEPTED: 900.00	300.00	300.00	300.00				
0001095	Crocker, Beth Elise		234-23-5321	TOTAL AR	BALANCE:	797.25			
			99/FA	2000/SP	2000/S1				
	T O T A L	AWARDED: 1,500.00							
		ACCEPTED: 1,500.00	500.00	500.00	500.00				
0002595	Drew, Daniel Andrew		468-66-7483	TOTAL AR	BALANCE:	3,270.00			
	T O T A L	AWARDED: 200.00							
		ACCEPTED: 200.00	100.00	100.00	0.00	0.00			

Direct Loan Anticipated Disb (DLAD)

Overview

Use the Direct Loan Anticipated Disb (DLAD) form to produce a variance or comparison report for Direct Loan anticipated disbursement data. Beginning with 1997/98 Direct Loan processing, anticipated disbursement data is exported from EDEExpress as a separate file. The anticipated disbursement data has been removed from the Direct Loan Application (DLAV) report.

The Direct Loan Anticipated Disb (DLAD) report compares the Colleague Direct Loan anticipated disbursement data in the Summary Loan (SL.ACYSR) file to the EDEExpress Direct Loan anticipated disbursement data in the Direct Loan (DL.ACYSR) file. The variance report lists only the differences between the anticipated disbursement data in the SL.ACYSR and DL.ACYSR files. The comparison report lists all anticipated disbursement data in the SL.ACYSR and DL.ACYSR files, whether the same or different.

You can use a saved list to select direct loans for the Direct Loan Anticipated Disb (DLAD) report. Loans awards are stored in the Summary Loan (SL.ACYSR) file by student ID and award ID (SL.STUDENT.ID*SL.AWARD). Your saved list must contain a list of IDs from the SL.ACYSR file. Colleague compares the IDs in your saved list to the record IDs in the SL.ACYSR file and restricts your selection to the records that match.

If you enter a saved list name in the Saved List Name field and student IDs in the Students group, Colleague uses the saved list as a basis for selecting loan records from the Summary Loan (SL.ACYSR) file and then narrows the selection using the data in the Students group.

If you want to further narrow your selection of loans, enter **Y** in the Additional Selection Criteria field. If you enter "Y" in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update or finish from the Direct Loan Anticipated Disb (DLAD) form. Use the Additional Selection Criteria form to construct selection criteria based on information in the Summary Loan (SL.ACYSR) file.

The variance report provides the following on its batch error report:



Note: If you leave the Saved List Name field and Students group blank, and if you do not construct any additional loan selection criteria, Colleague selects all records in the Summary Loan (SL.ACYR) file for the Direct Loan Anticipated Disb (DLAD) report.

1. SL.ACYR records with no SL.DL.LOAN.ID. These have not been exported using IDLX, or have not been linked to a DL.ACYR on the Direct Loan Application (DLA) form.
2. SL.ACYR records with SL.DL.LOAN.IDs that are not on DL.ACYR. This condition should not occur. It indicates that the DL.ACYR file is out of sync with the SL.ACYR file.
3. SL.ACYR records with SL.DL.LOAN.IDs to DL.ACYR records that have no EDEExpress information. These have been exported to EDEExpress but have yet to be imported back to **DL.ACYR**.

The comparison report includes those records that fit exceptions 1 and 3 above. Thus you can report on records you are contemplating exporting for the first time, and/or those records that you have exported but have not imported yet. If you are reporting on those that you have exported but not yet imported, the report is of the current Colleague information--not necessarily what was exported.

Sample Form

DLAD-Direct Loan Anticipated Disb

Academic Year **2003**
Display Only Differences

Saved List Name

Students

ID	Student
<input type="checkbox"/>	

Limit to Ready to Send Changes
Limit to Direct Loan Type

Additional Selection Criteria

Sample Report

June 25 1999 12:38		DIRECT LOAN ANTICIPATED DISBURSEMENTS								Page 1		
(VARIANCE)												
ID	Name	Award	Loan ID	N	-----Colleague Data-----				-----EDE Data-----			
					o Anticptd	Amt	Cancel	Refund	Anticptd	Amt	Cancel	Refund
0000007	Mr. Thomas J. Clark	PLUS	190654781P00E00059001	1	09/15/99	450			09/01/99	500		
				2	01/31/00	450			01/15/00	500		
0000007	Mr. Thomas J. Clark	SUB	190654781S00E00059001	1	09/15/99	561			09/01/99	561		
				2	01/31/00	561			01/15/00	561		

Direct Loan Disbursement (DLDV)

Overview

Use the Direct Loan Disbursement (DLDV) form to produce a variance or comparison report for Direct Loan actual disbursement data. The Direct Loan Disbursement (DLDV) report compares the Colleague Direct Loan actual disbursement data in the Summary Loan (SL.ACYSR) file to the EDEXpress Direct Loan actual disbursement data in the Direct Loan (DL.ACYSR) file. The variance report lists only the differences between the actual disbursement data in the SL.ACYSR and DL.ACYSR files. The comparison report lists all actual disbursement data in the SL.ACYSR and DL.ACYSR files, whether the same or different.

You can use a saved list to select direct loans for the Direct Loan Disbursement (DLDV) report. Loans awards are stored in the Summary Loan (SL.ACYSR) file by student ID and award ID (SL.STUDENT.ID*SL.AWARD). Your saved list must contain a list of IDs from the SL.ACYSR file. Colleague compares the IDs in your saved list to the record IDs in the SL.ACYSR file and restricts your selection to the records that match.

If you enter a saved list name in the Saved List Name field and student IDs in the Students group, Colleague uses the saved list as a basis for selecting loan records from the Summary Loan (SL.ACYSR) file and then narrows the selection using the data in the Students group.

If you want to further narrow your selection of loans, enter **Y** in the Additional Selection Criteria field. If you enter "Y" in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update or finish from the Direct Loan Disbursement (DLDV) form. Use the Additional Selection Criteria form to construct selection criteria based on information in the Summary Loan (SL.ACYSR) file.



Note: If you leave the Saved List Name field and Students group blank, and if you do not construct any additional loan selection criteria, Colleague selects all records in the Summary Loan (SL.ACYSR) file for the Direct Loan Disbursement (DLDV) report.

The variance report provides the following on its batch error report:

1. SL.ACYR records with no SL.DL.LOAN.ID. These have not been exported using IDLX, or have not been linked to a DL.ACYR on the Direct Loan Application (DLA) form.
2. SL.ACYR records with SL.DL.LOAN.IDs that are not on DL.ACYR. This condition should not occur. It indicates that the DL.ACYR file is out of sync with the SL.ACYR file.
3. SL.ACYR records with SL.DL.LOAN.IDs to DL.ACYR records that have no EDEExpress information. These have been exported to EDEExpress but have yet to be imported back to DL.ACYR.

The comparison report includes those records that fit exceptions 1 and 3 above. Thus you can report on records you are contemplating exporting for the first time, and/or those records that you have exported but have not imported yet. If you are reporting on those that you have exported but not yet imported, the report is of the current Colleague information--not necessarily what was exported.

Sample Form

DLDV-Direct Loan Disbursement

Academic Year **2003**
Display Only Differences

Saved List Name

Students

ID	Student
1	
2	
3	
4	
5	
6	
7	

Limit to Ready to Send Changes
Limit to Direct Loan Type

Additional Selection Criteria

Sample Report

This report does not print a hard copy. After you run the report, detail from the Process field to the report. Then you can view the report on your form instead.

Direct Loan Application (DLAV)

Overview

Use the Direct Loan Application (DLAV) form to produce a variance or comparison report for Direct Loan application data. The Direct Loan Application (DLAV) report compares the Colleague Direct Loan application data in the Calculation Summary (CS.ACYR), Calculation Input (CI.ACYR) and Summary Loan (SL.ACYR) files to the EDEExpress Direct Loan application data in the Direct Loan (DL.ACYR) file.



Note: The DLAV report does not compare origination information.

The variance report lists only the differences between the application data in the CI.ACYR, CS.ACYR, and SL.ACYR files and the application data in the DL.ACYR files. The comparison report lists all application data in the CI.ACYR, CS.ACYR, and SL.ACYR and all application data in the DL.ACYR files, whether the same or different.

You can use a saved list to select direct loans for the Direct Loan Application (DLAV) report. Loans awards are stored in the Summary Loan (SL.ACYR) file by student ID and award ID (SL.STUDENT.ID*SL.AWARD). Your saved list must contain a list of IDs from the SL.ACYR file. Colleague compares the IDs in your saved list to the record IDs in the SL.ACYR file and restricts your selection to the records that match.

If you enter a saved list name in the Saved List Name field and student IDs in the Students group, Colleague uses the saved list as a basis for selecting loan records from the Summary Loan (SL.ACYR) file and then narrows the selection using the data in the Students group.

If you want to further narrow your selection of loans, enter **Y** in the Additional Selection Criteria field. If you enter "Y" in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update or finish from the Direct Loan Application (DLAV) form. Use the Additional Selection Criteria form to construct selection criteria based on information in the Summary Loan (SL.ACYR) file.

The variance report provides the following on its batch error report:



Note: If you leave the Saved List Name field and Students group blank, and if you do not construct any additional loan selection criteria, Colleague selects all records in the Summary Loan (SL.ACYR) file for the Direct Loan Application (DLAV) report.

1. SL.ACYR records with no SL.DL.LOAN.ID. These have not been exported using IDLX, or have not been linked to a DL.ACYR on the Direct Loan Application (DLA) form.
2. SL.ACYR records with SL.DL.LOAN.IDs that are not on DL.ACYR. This condition should not occur. It indicates that the DL.ACYR file is out of sync with the SL.ACYR file.
3. SL.ACYR records with SL.DL.LOAN.IDs to DL.ACYR records that have no EDEExpress information. These have been exported to EDEExpress but have yet to be imported back to DL.ACYR.

The comparison report includes those records that fit exceptions 1 and 3 above. Thus you can report on records you are contemplating exporting for the first time, and/or those records that you have exported but have not imported yet. If you are reporting on those that you have exported but not yet imported, the report is of the current Colleague information--not necessarily what was exported.

Sample Form

DLAV-Direct Loan Application

Academic Year **2003**
Display Only Differences

Saved List Name

Students

ID	Student
<input type="checkbox"/>	

Limit to Ready to Send Changes
Limit to Direct Loan Type

Additional Selection Criteria

Sample Report

June 25 1999
12:42

DIRECT LOAN APPLICATION REPORT

Page 1

(VARIANCE)

Id	Name	Award	Loan Id	Field	Colleague Data	EDE Data
0000007	Mr. Thomas J. Clark	PLUS	190654781P00E00059001	DL.BIRTHDATE	01/06/57	01/10/57
				DL.DEPENDENCY	D	** NULL **
				DL.PGM.COMPLETION	05/15/00	06/03/02
				DL.AMOUNT.REQUESTE	900	1000
				DL.AMOUNT.APPROVED	900	1000
				DL.PLUS.DEFAULT.LO	Y	N
0000007	Mr. Thomas J. Clark	SUB	190654781S00E00059001	DL.DEPENDENCY	D	** NULL **
				DL.DEFAULT.LOANS	Y	N
				DL.NOTE.SIGNED	Y	N
				DL.LOAN.PERIOD.STA	09/10/99	09/01/99
				DL.LOAN.PERIOD.END	05/31/00	05/15/00

Electronic Loan Appl Variance (ELAV)

Overview

Use the Electronic Loan Appl Variance (ELAV) report to compare Colleague application and loan data to Response File application and loan data imported from a CommonLine Network service provider.

You can use the Import Electronic Loan Files (IELF) process to import Response File data. The IELF process also produces an output saved list of imported Response File application data (Loan/App'l Output Saved List Name) for use in this report.

You have the option of producing a variance report or a comparison report. The variance report lists only the differences between Colleague data and imported Response File data. The comparison report lists Colleague data and imported Response File data, whether the same or different.

The information displayed on the report will depend on the selected comparison parameter. A comparison parameter is a code that represents a group of data elements. For example, you might run a variance report on borrower data and a comparison parameter to represent the borrower data and another to represent school certification data. Comparison parameters are defined on the Electronic Loan Compare Param (ELCP) form.



Note: The Import Electronic Loan Files (IELF) process is performed to update the Response File application records (EL.APP) and Response File guarantee records (EL.LOAN) on Colleague with the most current Response File data from a service provider. The Colleague variance reports highlight any differences that exist between Colleague data (SL.ACYR and LA.ACYR) and Response File data imported from a CommonLine Network service provider. The Import Electronic Loan Files (IELF) process should be performed regularly to ensure that Colleague electronic loan processing is based on the most current Response File data from a service provider.

Records for the Electronic Loan Appl Variance (ELAV) report are selected from the SL.ACYR file. You can limit your selection of records by:

- Saved List
- Students
- Awards
- Additional Selection Criteria

Colleague ignores SL.ACYR records (that is, loan awards) that have not been defined for use with electronic applications. Awards are defined on the Award Definition (AWD) form. Colleague uses the First Appl Year field to determine if an application record should be created.



Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague selects all SL.ACYR records (that is, loan awards) defined for use with electronic applications for the Electronic Loan Appl Variance (ELAV) report.

Sample Form

ELAV-Electronic Loan Appl Variance

Academic Year

Comparison Parameter ID

Display Only Differences

Exclude Appls With No Import Data

Saved List

Students

ID	Student
<input type="text" value="1"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>
<input type="text" value="3"/>	<input type="text"/>

Awards

Code	Description
<input type="text" value="1"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text"/>
<input type="text" value="3"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

June 29 1999
 Page 1
 11:35

LOAN VARIANCE REPORT

YEAR: 1999

(Comparison)

ID	SSN	NAME	AWARD	APP/	LOAN	RESPONSE ID	FIELD NAME	IMPORTED DATA	COLLEAGUE DATA
0000001	111-11-1118	Smith, Kenneth	STAFE	APP	1003000000D000065				
0000002	215-45-0028	Matthews, Randy	EPLUS	APP	1003000000D000075				
0000002	215-45-0028	Matthews, Randy	STAFE	APP	1003000000D000063				
0000981	123-45-6890	Jennings, Amy	EPLUS	APP	1003000000D000073				
0018695	222-44-9991	Mason, Allan	ALT1	APP	1003000000D000057				
0018823	111-98-6789	Rose, Sarah	STAFE	APP	1003000000D000058				
0018836	012-10-1210	Feld, Brett	EPLUS	APP	1003000000D000068				

Elec Roster History Report (ELDH)

Overview

Use the Elec Roster History Report (ELDH) to list, for a Colleague disbursement, a history of the Disbursement Roster File records imported from a CommonLine Network service provider. You can use the Import Electronic Loan Files (IELF) process to import Disbursement Roster File data.

Colleague displays the roster date, amount, and fund method from the Disbursement Roster File record with the most recent creation date (not necessarily the record that was last imported) on the Loan Disbursements (LDIS) form. Colleague also maintains a history of imported Disbursement Roster File records with an earlier creation date.

The report displays the following information:

- Student ID
- Student SSN
- Student Name
- Award ID
- Disbursement Number
- Colleague Transmitted Amount
- Returned Amount (recorded by user)



Note: The Import Electronic Loan Files (IELF) process is performed to update the Response File application records (EL.APP), Response File guarantee records (EL.LOAN), and Disbursement Roster File records (EL.ROSTER) on Colleague with the most current Response/Disbursement Roster File data from a service provider. The Colleague variance reports highlight any differences that exist between Colleague data (SL.ACYR and LA.ACYR) and Response/Disbursement Roster File data imported from a CommonLine Network service provider. The Import Electronic Loan Files (IELF) process should be performed regularly to ensure that Colleague electronic loan processing is based on the most current Response/Disbursement Roster File data from a service provider.

Records for the Elec Roster History Report (ELDH) report are selected from the SL.ACYR file. You can limit your selection of record by

- Saved List
- FA Office
- Students
- Additional Selection Criteria

Colleague ignores SL.ACYR records (that is, loan awards) that have not been defined for use with electronic applications. Awards are defined on the Award Definition (AWD) form. Colleague uses the First Appl Year field to determine if an application record should be created. Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague selects all SL.ACYR records (that is, loan awards) defined for use with electronic applications for the Elec Roster History Report (ELDH) report.

Sample Form

ELDHElec Roster History Report

Academic Year **2005**

Saved List

FA Offices

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>

Students

ID	Student
1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>

Additional Selection Criteria

Sample Report

Jun 29 1999		DISB ROSTER HISTORY REPORT										Page 1
ID	SSN	Student Name	Award	Disb No	Colleague Transmit	Returned	Net Disb Amt	Orig Fee	Guarantee Fee	Gross Disb Amt	F M	Check Number
0000244	154-89-3567	Bower, Abigal	STAFE	1	0.00	750.00						
							750.00	14.34	4.78	478.00	E	0000082944
							750.00	14.34	4.78	478.00	E	0000082944
							458.00	14.34	4.78	478.00	E	0000082944
							458.00	14.34	4.78	478.00	E	0000082944
0000440	456-78-9020	Gill, Megan	STAFE	2		100.00						
							115872.00	3621.00	1207.00	120700.00	I	0000082944
							1158.72	36.21	12.07	1207.00	I	0000082944
							1158.72	36.21	12.07	1207.00	I	0000082944
0015946	541-88-8254	Henry, Kelly	USTFE	1	960.00							
							12780.72	39.96	13.32	1332.00	E	0000082944
							1278.72	39.96	13.32	1332.00	E	0000082944
							1278.72	39.96	13.32	1332.00	E	0000082944
							1278.72	39.96	13.32	1332.00	E	0000082944
							1278.72	39.96	13.32	1332.00	E	0000082944
0017729	546-98-7415	Quinn, James	ALT1	1	0.00							
							15000.00	3.12	1.04	104.00	E	0000082944
							1500.00	3.12	1.04	104.00	E	0000082944
							1500.00	3.12	1.04	104.00	E	0000082944
							1500.00	3.12	1.04	104.00	E	0000082944
							99.84	3.12	1.04	104.00	I	0000082945
							99.84	3.12	1.04	104.00	E	0000082945
							99.84	3.12	1.04	104.00	E	0000082945
							99.84	3.12	1.04	104.00	E	0000082945

Elec Loan Disbursement Roster (ELDR)

Overview

Use the Elec Loan Disbursement Roster (ELDR) report to list the data in the Disbursement Roster File records imported from a CommonLine Network service provider for a selected creation date range. You can sort selected Disbursement Roster File records by creation date, recipient, or Colleague EL.ROSTER record ID.

The report displays the following information:

- Student Name
- Student SSN
- Award ID
- Application ID
- Application Sequence No.
- Lender
- Disbursement Date
- Disbursement Number
- Gross Disbursement Amount
- Origination Fee
- Guarantee Fee
- Net Disbursement Amount
- Fund Method
- Check No.



Note: The Import Electronic Loan Files (IELF) process is performed to update the Response File application records (EL.APP), Response File guarantee records (EL.LOAN), and Disbursement Roster File records (EL.ROSTER) on Colleague with the most current Response/Disbursement Roster File data from a service provider. The Colleague variance reports highlight any differences that exist between Colleague data (SL.ACYR and LA.ACYR) and Response/Disbursement Roster File data imported from a CommonLine Network service provider. The Import Electronic Loan Files (IELF) process should be performed regularly to ensure that Colleague electronic loan processing is based on the most current Response/Disbursement Roster File data from a service provider.

Records for the Elec Loan Disbursement Roster (ELDR) report are selected from the EL.ROSTER file. You can limit your selection of records by source. The source of the Disbursement Roster File is selected from the RECIPIENT file. Recipients are defined on the Recipient Agency (RECP) form. In a typical Colleague electronic loan processing workflow, the creator of the Response File or Disbursement Roster File was previously designated the recipient of an Application Send File or Change Transaction File created on Colleague and, thus, should already be defined as a recipient in the RECIPIENT file.

If you leave the Sources group blank, Colleague selects all EL.ROSTER records in the selected date range for the Elec Loan Disbursement Roster (ELDV) report.

Sample Form

ELDR-Elec Loan Disbursement Roster

Sort By ▼

Start Date 

End Date 

Recipients

1	<input type="text"/>	
2	<input type="text"/>	
3	<input type="text"/>	
4	<input type="text"/>	
5	<input type="text"/>	
6	<input type="text"/>	
7	<input type="text"/>	
8	<input type="text"/>	
9	<input type="text"/>	
10	<input type="text"/>	

Sample Report

06/25/99		Electronic Loan Disbursement Roster						For 01/01/98 to 01/01/99		
Name	SSN	-----Disbursement-----								
Award ApplicationSeq	LenderDate....	No	Gross....*	Orig Fee.*..	Guar Fee.*..	Net....*	Method	Check No		
FRIEDMAN, BARBARA M	238974934									
STAFE	100300000d000023	01	80780706/17/99	2	1207.00	362.00	1207.00	1158.00	I	000829447
MASTERS, ANNE C	555555555									
	0000380008d000048	00	80780706/17/99	2	1332.00	39.69	13.32	1278.72	I	000829444
WHEELER, DAVID	456789012									
	0000380008d000052	00	80780706/17/99	2	478.00	14.34	4.78	458.88	I	000829446
PATTON, SHELLY	564894679									
	0029290000a000323	00	80780706/17/99	2	104.00	3.12	1.04	99.84	I	000829445
FRIEDMAN, JANE	456123789									
PLUSE	100300000d000051	01	80780706/17/99	2	1207.00	36.21	12.07	1158.72	I	000829447
DYLAN, JERRY	987123987									
	100300000d001235	00	80780706/17/99	2	456.00	56.23	4.56	432.87	I	000829448
MEILKE, PHIL	369258147									
	100089000d001235	00	80780706/17/99	2	678.00	78.34	6.78	656.84	I	000829448
MATTHEWS, WESLEY	546213879									
	0000380008d000048	00	80780706/17/99	2	1123.00	23.56	11.23	987.34	I	000829449
WILSON, MARY	124578369									
	0000380008d000049	00	80780706/17/99	2	812.00	14.56	8.12	794.59	I	000829444
RYAN, NICOLE	748596123									
	100089000d001235	00	80780706/17/99	2	642.00	12.58	6.42	587.04	I	000829501
FRIEDMAN, BARBARA M	238974934									
PLUSE	100300000d000051	00	80780706/17/99	1	1207.00	36.21	12.07	1158.00	E	000829447
WHEELER, DAVID	456789012									
STAFE	0008000004568579	00	80780706/17/99	1	478.00	14.34	4.78	458.88	E	000829446
PATTON, SHELLY	564894679									
	0029290000a000323	00	80780706/17/99	1	104.00	3.12	1.04	15.00	E	000829445
MCGEE, RYAN	398217456									
	100300000d001235	00	80780706/17/99	2	213.00	5.12	2.13	16.47	I	000829501
PAULUS, JAIME	564213897									
PLUSE	0029290000a000323	00	80780706/17/99	2	745.00	15.78	7.45	48.01	I	000829448
Subtotals for date/time/source:					10786.00	715.20	1302.79	9309.20		
Subtotals for 06/17/99:					10786.00	715.20	1302.79	9309.20		
=====										
=====										
TOTALS:					10786.00	715.20	1302.79	9309.20		

Electronic App Disb Variance (ELDVS)

Overview

Use the Electronic Appl Disb Variance (ELDVS) report to compare Colleague disbursement data to Response/Disbursement Roster File disbursement data imported from a CommonLine Network service provider. The report may be limited to anticipated or actual disbursements.

You can use the Import Electronic Loan Files (IELF) process to import Response File data. The IELF process also produces an output saved list of imported Response File application data (Loan/App Output Saved List Name) for use in this report.

You have the option of producing a variance report or a comparison report. The variance report lists only the difference between Colleague disbursement data and imported Response/Disbursement Roster File disbursement data. You can produce an output saved list of affected records. The comparison report lists Colleague disbursement data and imported Response/Disbursement Roster File disbursement data, whether the same or different.

The report displays the following information:

- Student ID
- Student SSN
- Student Name
- Award ID
- Disbursement Number
- Colleague Anticipated Disbursement
- Response Anticipated Disbursement
- Colleague Transmitted Amount
- Response Net Disbursement
- Returned Amount (recorded by user)



Note: The Import Electronic Loan Files (IELF) process is performed to update the Response File application records (EL.APP) and Response File guarantee records (EL.LOAN) on Colleague with the most current Response File data from a service provider. The Colleague variance reports highlight any differences that exist between Colleague data (SL.ACYR and LA.ACYR) and Response File data imported from a CommonLine Network service provider. The Import Electronic Loan Files (IELF) process should be performed regularly to ensure that Colleague electronic loan processing is based on the most current Response File data from a service provider.

Records for the Electronic App Disb Variance (ELDV) report are selected from the SL.ACYR file. You can limit your selection of records by

- Saved List
- FA Office
- Students
- Additional Selection Criteria

Colleague ignores SL.ACYR records (that is, loan awards) that have not been defined for use with electronic applications. Awards are defined on the Award Definition (AWD) form. Colleague uses the First Appl Year field to determine if an application record should be created.



Note: If you leave all selection criteria fields blank and do not construct any additional selection criteria, Colleague selects all SL.ACYR records (that is, loan awards) defined for use with electronic applications for the Electronic App Disb Variance (ELDV) report.

Sample Form

ELDV-Electronic App Disb Variance

Academic Year **2005**

Report Type

Saved List

FA Offices

1	<input type="text" value=""/>
2	<input type="text" value=""/>
3	<input type="text" value=""/>

Students

ID	Student
1	<input type="text" value=""/>
2	<input type="text" value=""/>
3	<input type="text" value=""/>

Output Savedlist Name

Additional Selection Criteria

Sample Report

Jul 12 1999		APPLICATION VARIANCE REPORT										
1		(COMPARISON)										
		:--- Anticipated --: :----- Actual -----:										
Variance		Disb ColleagueResponseColleagueResponseRosterReturned										
ID	SSN	Student Name	Award	No	Ant Gross	Ant Gross	Transmit	Net Disb	Net Disb	Amount	Indicator	

0000178	234-09-6513	Richards, Kelly	STAFE	1	1312		0.00				*	
				2	1313		0.00				*	
0000793	090-09-0909	Cooke, Greg	STAFE	1	1312		0.00				*	
				2	1313		0.00				*	
0001204	053-70-5243	McMichael, Casey	STAFE	1	1312		0.00				*	
				2	1313		0.00				*	
0001806	292-92-9999	Parrish, James	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
0002114	312-54-6699	Chutka, James	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
0002807	292-99-2929	Johnson, Tonya	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
0002808	393-99-9933	Belton, Rhonda	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
0002811	987-12-3456	Curtis, Deanne	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
0002812	551-43-2222	Driscoll, Ronald	STAFE	1	1313		0.00				*	
				2	1312		0.00				*	
End of Report												

FA Labels (FAFL)

Overview

Use the FA Labels (FAFL) form to generate mailing labels for a group of FA applicants. Colleague uses records from the FIN.AID file to select individuals who are financial aid applicants. You can use either a saved list of IDs from the FIN.AID file or the specific selection options on the FAFL form to select which applicants Colleague will generate mailing labels for.

The mailing labels use a standard format, defined as the FA.LABELS form, that you can modify if this format does not meet your requirements. You can modify this format in one of two ways. You can either change the FA.LABELS format so that each time you run these labels the new format is used; or you can create a custom format that you specifically select whenever you need to use a variation of the default.

For example, the default format is a 3-up style label. If you always print your mailing labels as 2-up labels, change the FA.LABELS format so that the labels always print in that style. If you typically use the 3-up format but occasionally want to use the 2-up labels, you can create a custom form that you would substitute at the time of printing (by entering the form name in the Form field on the FAFL form) each time you generate the labels.

You modify this format by using the Forms Processing forms in the Core application.

Specifying Output Options

After you complete this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify whether you want output to go to the printer or the terminal, and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.



Note: This report prints alignment labels.

Sample Form

FAFL-FA Labels

Form Name **FA.LABELS** Financial Aid Label

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection

Saved List Name

Begin End

POSTAL CODE

FA Years

POSTAL CODEs.....:

Additional Selection Criteria

Sample Report

0000983
Lauren Padgett
14 Main Street
Herndon VA 22035

0000022
Miss Anne C. Masters
551 Terrace Lane
Fairfax VA 22030

0000024
Ms. Elaine P. LaBarre
65 Kingsbridge Road
Alexandria VA 22305

0000001
Mr. Kenneth Masson
3699 Mt. Vernon Avenue
Alexandria VA 22305

0001330
Mr. Jonathan Smith
1629 Halls Road
Baltimore, MD 49511

0051974
Ms. Kimberly Camps
80 Grant Street
Allentown PA 43124

0001193
Ms. Jenifer Neamand
211 Lincolnshire Lane
Atlanta GA 30103

0000828
Mrs. Charlene Eldridge
1 Kingswoods Drive
Burke VA 22015

0000244
Mrs. Marilyn Cooke
4375 Fair Lakes Court
Fairfax VA 22033

0000982
Miss Paulina Willis
504 Gloucester Avenue
Middlesboro KY 40965

0000077
Miss Mary Mohr
45 Little Creek Way
Fairfax VA 22033

0018314
Susan Fredrickson
79 Summit Manor Court
Fairfax VA 22033

0017457
Mr. Richard Glassey
44064 Ford Avenue
Fairfax VA 25414

0018585
Miss Bonnie Brown
13502 Virginia Parkway
Herndon VA 22032

0000023
Mr. Samuel Guthrie
125 Willowcrest Road
Apartment 403A
Arlington VA 22081

0000986
Jordan Welsely
34 Anthem Lane
Culpeper VA 23569

0000757
Mr. James D. MacElroy
1 Main Street
Santa Rosa CA 95401

0051106
Ms. Linda Lincoln
3434 April Lane
Sterling VA 20166

0000990
Alicia Wilson
30 Fulton Road
Manchester CT 06040

0000440
Miss Barbara Friedman
83 Maple Drive
Waterville ME 04091

0014996
Mr. Justin Jones
4805 Jordan Avenue
Stillwater OK 74074

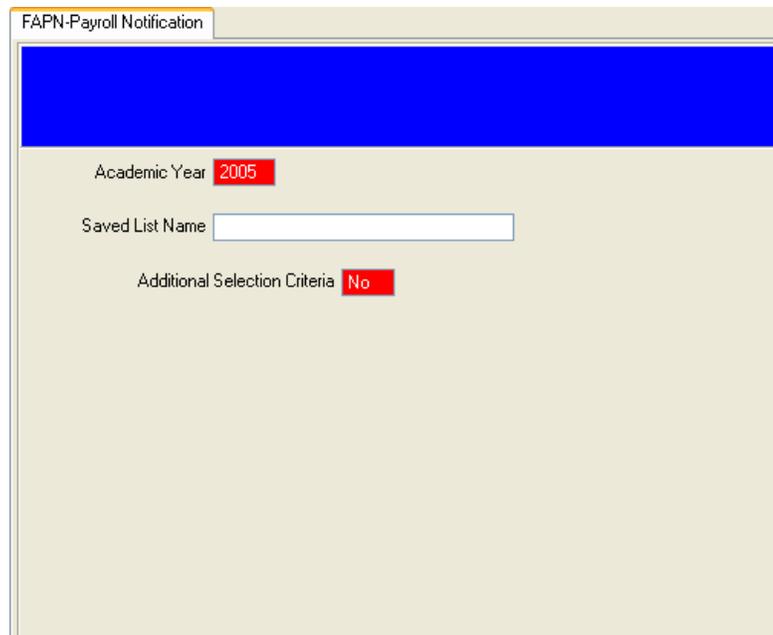
Payroll Notification (FAPN)

Overview

Use the Payroll Notification (FAPN) report to obtain a listing for the personnel office of the students who are eligible for work study or other payroll-related awards. The personnel files may then be updated in preparation for further payroll processing.

The report is sorted alphabetically by name and the includes the student name, ID number, social security number, award, award amount, and the description of the destination classification associated with the award.

Sample Form



The screenshot shows a web form titled "FAPN-Payroll Notification". The form has a blue header bar. Below the header, there are three input fields: "Academic Year" with a red dropdown menu showing "2005", "Saved List Name" with a white text input field, and "Additional Selection Criteria" with a red dropdown menu showing "No".

Sample Report

07-13-99		PAYROLL NOTIFICATION				PAGE	1
ID	NAME	S.S.NO	AWARD	AMOUNT	DESTINATION		
-----	-----	-----	-----	-----	-----		
0001222	Dean, Michael	198-47-9043	W01	750.00	COLLEGE WORK STUDY		
0000639	McMichael, Casey	561-37-4018	W01	725.00	COLLEGE WORK STUDY		
0001089	Smith, Elaine	973-94-9034	FWS	100.00	COLLEGE WORK STUDY		

Sample Report

SECTION D

```

=====
Sources Of Assistance | Current |
Cumulative           | 1998-1999 |
=====
Federal Pell Grant:   Total Disbursement | 400.00 |
XXXXXXXXXX
Scheduled Award (full time, full year) | 0.00 |
XXXXXXXXXX
Expected Additional Disbursements [    ] | XXXXXXXXXX |
XXXXXXXXXX
Federal Perkins/NDSL Loans | 0.00 |
0.00
SSIG/State Grant/Other |    |
Inst. Scholarships    | 14.00 |
14.00
=====
    
```

SECTION E

```

=====
Loan Type             | Loan Period | Lvl | Amount |
Cumulative
=====
Subsid Fed Stafford/Ford Loans | XXXXXXXX | | |
0.00
=====
Unsub Fed Stafford/Ford Loans | | | |
0.00
=====
Federal SLS           | XXXX | XXX | |
0.00
=====
Federal PLUS/Direct PLUS | | XXX | |
|XXXXXXXXXXXX
=====
    
```

SECTION F

COMMENTS:
 COMMENTS HERE.
 X FROM: Datatel University003808
 ----- 4375 Fair Lakes Court
 AUTHORIZED SIGNATURE Fairfax, VA 22033
 DIR. OF FINANCIAL AID

Award Analysis (FCAR)

Overview

Use the Award Analysis (FCAR) report to obtain a listing of all or selected awards that have been awarded within a specific academic year.

The report lists the following information for each award:

- the name of each student who has applied for the award
- the total award amount
- the applicant's program and class
- the award period distribution amounts
- the award period action statuses

Subtotals are provided by award for the total number of awards, total award amount for the academic year, and the total award amount per award period for the academic year. Academic year and award period totals are also provided for accepted, pending, estimated, denied, and rejected action statuses.

You can also print this report for selected programs, awards, and action statuses if you need a subset of award data for analysis.

Sample Form

FCAR-Award Analysis

Academic Year **2005**

Award Periods **1** **2** **3**

Saved List Name

Awards

Code	Description
1	
2	
3	

Action Statuses **1** **2** **3**

Additional Selection Criteria **No**

Sample Report

06/29/99

FINANCIAL AID AWARD ANALYSIS FOR ACADEMIC YEAR
 AWARD: PELL Pell Grant

Page 1

ID.NO	N A M E	AWARD	99/FA	OTHER
-----	-----	-----	-----	-----
0000030	Robinson, Laura	800.00	400.00 A	322.00 A
1 term(s) summed into OTHER				
0018932	Glanville, Doug	3125.00	1563.00 A	1562.00 A
1 term(s) summed into OTHER				
0018933	Gant, Bill	1547.00	928.00 A	619.00 A
1 term(s) summed into OTHER				
0018934	Abreu, Roberta	3125.00	1563.00 A	1562.00 A
1 term(s) summed into OTHER				
0018935	Lieberthal, Mic	1378.00	788.00 A	590.00 A
2 term(s) summed into OTHER				

5	ACCEPTED:	9,975.00	5242.00	4655.00
0	PENDING:			
0	ESTIMATED:			
0	DENIED:			
0	REJECTED:			
=====				
5	TOTAL:	9,975.00	5242.00	4655.00

Fund Management (FMGT)

Overview

Use the Fund Management (FMGT) report to list total award amounts, total award amounts by action category, and total transmitted award amounts by award, office, and student. Use the Summary Only field to suppress student detail and produce a summary report. Use the Include by Location field to include FA location detail in your report.



Note: If you elect to include FA location detail, students with award period awards for more than one location with the same office will be counted twice on the fund management report.

You can use a saved list to select award period awards for the fund management report. Award period awards are stored in the Term Award (TA.ACYSR) file by student ID, award ID, and award period (TA.STUDENT.ID*TA.TERM.ID). Your saved list must contain a list of IDs from the TA.ACYSR file and restricts your selection to the records that match.

If you enter a saved list name in this field, and student IDs in the Students group or award IDs in the Awards group, Colleague uses the saved list as a basis for selecting records from the Term Award (TC.ACYSR) file and then narrows the selection using the data in the Students group and the Awards group.

If you want to further narrow your selection of award period awards, enter [Y] in the Additional Selection Criteria field. If you enter "Y" in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update of finish from the Fund Management (FMGT) form. Use the Additional Selection Criteria form to construct selection criteria based on information in the Term Award (TA.ACYSR) file.



Note: If you leave the Saved List Name field, Students group, and Awards group blank, and if you do not construct any additional loan selection criteria, Colleague selects all records in the Term Award (TA.ACYSR) file for the fund management report.

Sample Form

FMGT-Fund Management

Academic Year **2005**

Summary Only

Include by Location

Saved List Name

Students

ID	Student
1 <input type="text"/>	<input type="text"/>
2 <input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>
4 <input type="text"/>	<input type="text"/>

Awards

Code	Description
1 <input type="text"/>	<input type="text"/>
2 <input type="text"/>	<input type="text"/>
3 <input type="text"/>	<input type="text"/>
4 <input type="text"/>	<input type="text"/>

Additional Selection Criteria

Sample Summary Report

July 6 1999

FUND MANAGEMENT REPORT

Page 1

YEAR: 1998	SUM ONLY: Y	INCL LOC:	AWARD:	FSTAF - Federal Stafford Loan	AWARD AMT	AWARDED AMT	TOTAL XMIT	TOTAL	TOTAL	TOTAL	TOTAL	TOTAL
ACC	EST	PEN	DEN	REJ								

OFFICE: MAIN - DATATEL UNIVERSITY - MAIN												
OFFICE 'MAIN' TOTALS:												
BUDGETED AMOUNT... : 99,999,999					5,500.00				5,500.00			
MAXIMUM BUDGET... : 99,999,999					1				1			
REMAINING BALANCE: 99,994,499.00						5,500.00						
						1						
AWARD 'FSTAF' TOTALS:												
BUDGETED AMOUNT... : 99,999,999					5,500.00				5,500.00			
MAXIMUM BUDGET... : 99,999,999					1				1			
REMAINING BALANCE: 99,994,499.00						5,500.00						

End of Report

Sample Detail Report

July 6 1999			FUND MANAGEMENT REPORT							Page 1	
YEAR: 1998			SUM ONLY: N		INCL LOC: AWARD: FSTAF - Federal Stafford Loan						
STUDENT	NAME	SSN	AWARD AMT	AWARDED AMT	TOTAL XMIT	TOTAL ACC	TOTAL EST	TOTAL PEN	TOTAL DEN	TOTAL REJ	

OFFICE: MAIN - DATATEL UNIVERSITY - MAIN											
0000242	Hersey, Amy Lynn	666-77-1111	5,500.00	5,500.00			5,500.00				
OFFICE 'MAIN' TOTALS:			=====	=====	=====	=====	=====	=====	=====	=====	
BUDGETED AMOUNT...: 99,999,999			5,500.00				5,500.00				
MAXIMUM BUDGET...: 99,999,999			1				1				
REMAINING BALANCE: 99,994,499.00				5,500.00							
				1							
AWARD 'FSTAF' TOTALS:			=====	=====	=====	=====	=====	=====	=====	=====	
BUDGETED AMOUNT...: 99,999,999			5,500.00				5,500.00				
MAXIMUM BUDGET...: 99,999,999			1				1				
REMAINING BALANCE: 99,994,499.00				5,500.00							
				1							
OFFICE 'MAIN' TOTALS:			=====	=====	=====	=====	=====	=====	=====	=====	
BUDGETED AMOUNT...: 800,000			1,000.00								
MAXIMUM BUDGET...: 920,000			1								
REMAINING BALANCE: 799,000.00				1,000.00				1,000.00			
				1				1			
AWARD 'FWS' TOTALS:			=====	=====	=====	=====	=====	=====	=====	=====	
BUDGETED AMOUNT...: 800,000			1,000.00								
MAXIMUM BUDGET...: 920,000			1								
REMAINING BALANCE: 799,000.00				1,000.00				1,000.00			
End of Report											

Need Analysis Comparison (NEAC)

Overview

Use the Need Analysis Comparison (NEAC) report to list multiple copies of a student's financial aid applications from CI.ACYR and CR.ACYR. The report prints a comparison of parent and student financial information for a given group of calculation input types and for a specific academic year.

You can enter a saved list of student IDs to process in the Saved List Name field, or you can enter student IDs individually in the Students window.



Note: If you do not enter either a list name in the Saved List Name field or individual IDs in the Students window, the report will select the entire CI.ACYR file. You can further restrict your selection by entering additional selection criteria.

The NEAC report provides a copy of all the information provided on the student's financial aid forms. If you want to report on only the differences between two input types for a given year, use the Compare Calc Input Type (CCIT) form.

The NEAC report stores the entries made the last time the report was run. You can override any of these entries. The default input type is the Current Calc Input Type defined on the FA Default Definition (FADD) form. The default academic year is the year defined in the Current Year field on the FADD form.

You can enter a maximum of four calculation input types for a single report.

Sample Form

NEAC-Need Analysis Comparison

Academic Year **2004**

Saved List Name

Students

ID	Name
<input type="text" value="1"/>	
<input type="text" value="2"/>	
<input type="text" value="3"/>	
<input type="text" value="4"/>	
<input type="text" value="5"/>	
<input type="text" value="6"/>	
<input type="text" value="7"/>	
<input type="text" value="8"/>	
<input type="text" value="9"/>	
<input type="text" value="10"/>	

Calc Input Type

Additional Selection Criteria

Sample Report

June 25 1999 NEED ANALYSIS COMPARISON

Page 1 12:59

Student ID: 0000193

Name: Mr. Jane L. Henderson

SSN: 123-45-6789

Year: 1999

Parents' Information

Students' Information

-----	-----
	CSS
	Tax Return Filed
	2
	3
	Tax Form Type
	2
	Eligible for 1040A EZ
	AGI/Taxable Income
	10579
	3000
	Total Amount Worksheet A
	23000
	1500
	Total Amount Worksheet B
	3150
	0
	Income Adjustments
	Total Income
	7429
	3000
	=====
	US Income Tax
	1205
	Medical/Dental Expenses
	575
	Elementary Tuition
	1200
	Additions to Emp Allowance
	Cash & Bank Accounts
	500
	500
	Home Equity
	9000
	Investment Net Worth
	0
	0

Sample Report

Page 2

```
=====
```

FC Primary	0
FC Secondary	
Alt Primary	
Alt Secondary	
IM Primary	1840
IM Secondary	2672
PGI Primary	
PGI Secondary	
Supp Primary	
Supp Secondary	

```
=====
```

Overaward Report (OAWR)

Overview

Use the Overaward Report (OAWR) form to identify students who have overawarded funds. The report specifically searches for individuals who have negative unmet needs and negative unmet cost values.

Sample Form

OAWR-Overaward Report

Academic Year

Overawarded Need

Overawarded Cost

Saved List Name

Students

ID	Student
<input type="text" value="1"/>	
<input type="text" value="2"/>	
<input type="text" value="3"/>	
<input type="text" value="4"/>	
<input type="text" value="5"/>	
<input type="text" value="6"/>	

Additional Selection Criteria

Sample Report

1999 June 29 13:17		OVERAWARD REPORT										Page 1
STUDENTS WITH OVERAWARDED NEED AND/OR COST												
:----- INST -----: :----- CB -----:												
Student ID Name	SS Number	COA	FC	Need	Ucost	Uneed	Awarded	COA	FC	Need	Ucost	Uneed
0018395 Casey McMichael	123-12-1234	15500			12695		2805.00	15500	33867	0	12695	-2805
Total Students: 1												

SAP Management Report (SAPM)

Overview

Use the SAP Management Report (SAPM) form to generate a report of SAP results by student and SAP type. You can limit SAP results to be included in the report by date, SAP type, or SAP status. In addition, you can limit report SAP results to those with SAP status appeals.

You can use a saved list to select SAP calculations for the SAP monitoring report. SAP calculations are stored in the SAP Results (SAP.RESULTS) file by sequential key. Your saved list must contain a list of IDs from the SAP.RESULTS file. Colleague compares the IDs in your saved list to the record IDs in the SAP.RESULTS file and restricts your selection to the records that match.

If you enter a saved list name in this field and student IDs in the Students group. Colleague uses the saved list as a basis for selecting records from the SAP Results (SAP.RESULTS) file and then narrows the selection using the data in the Students group.

If you want to further narrow your selection SAP results, enter [Y] in the Additional Selection Criteria field. If you enter “Y” in the Additional Selection Criteria field, Colleague displays the Additional Selection Criteria form when you update or finish from the SAP Management (SAPM) form. Use the Additional Selection Criteria form to construct selection criteria based on information in the SAP Results (SAP.Results) file.



Note: If you leave the Saved List Name field and Students group blank, and if you do not construct any additional loan selection criteria, Colleague selects all records in the SAP Results (SAP.RESULTS) file for the SAP management report.

Sample Form

SAPM-SAP Management Report

Saved List Name

SAP Calcs From/To Date

SAP Types 1 2 3

Current SAP Status 1 2

Limit to SAP Status with Appeals

Students

ID	Student
1	
2	
3	
4	
5	
6	
7	
8	

Additional Selection Criteria

Sample Report

June 29 1999
MANAGEMENT REPORT

SATISFACTORY ACADEMIC PROGRESS

PAGE 1

ID NO	SSN	STUDENT NAME	SAP TYPE	CALC DT	CUM GPA CREDIT HOURS	CUM GPA % PGM	CUM GRADE	GPA PTS	CUM GPA	PERCENT EARNED	SAP STATUS	OVR	CURRENT APPEALS ACTION
0000020	156-78-9564	Smith, Jessica	S	03/11/99	12.00				3.3	100.0	Satisfactory	A	
0002115	135-76-3369	Adams, Julie	S	03/18/99	36.00				2.4	89.00	Satisfactory	A	
0002595	468-66-7483	Drew, Daniel	S	03/11/99	12.00				2.8	94.00	Satisfactory	A	

TOTAL NUMBER OF STUDENTS: 3

Student Budget Detail (SBDT)

Overview

Use the Student Budget Detail (SBDT) form to generate a report showing the current financial aid budget components for a selected group of individuals.

The report shows the following:

- all budget component codes that have been assigned to each student
- the calculated and, if applicable, overridden amounts for each component for each budget type (campus-based, institutional, and Pell)
- status information and an indication of whether or not individual components are frozen
- details about any budget or family contribution adjustments made
- optionally, summary information about the student's need calculation

To run this report you must complete the Additional Selection Criteria form after you have completed the SBDT form.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Report in Phantom Mode

The last form that is displayed when you run this report is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in phantom (background) mode.

Sample Form

SBDT-Student Budget Detail

Academic Year

Print Need Information

Saved List Name

Students

<input type="checkbox"/>	<input type="text"/>	

Additional Selection Criteria

Sample Report

Jul 13 1999 04:59PM		Student Budget Details Report Academic Year: 1999						Page 1	
0000001	Smith, Fred								
		CB		INST		PELL			
		Amt	Ovr	Amt	Ovr	Amt	Ovr	Status	Frozen
Budget Components		-----	-----	-----	-----	-----	-----	-----	-----
Total Expenses:			-----		-----		-----		
Budget Adjustments		CB Amt		INST Amt		PELL Amt			
No Budget Adjustment Codes		-----		-----		-----			
Total:			-----		-----		-----		
FC Adjustments		CB Amt		INST Amt					
No FC Adjustment Codes		-----		-----					
Total:			-----		-----				
Need Calculation									
		CB		INST		PELL			
Budget....:		-----		-----		-----			
Budget Adj:		-----		-----		-----			
Total:		0		0		0			
FC.....:		-----		-----					
FC ADJ....:		-----		-----					
Total:		0		0					
NEED.....:		=====		=====					

Budget Rule Report (SBRL)

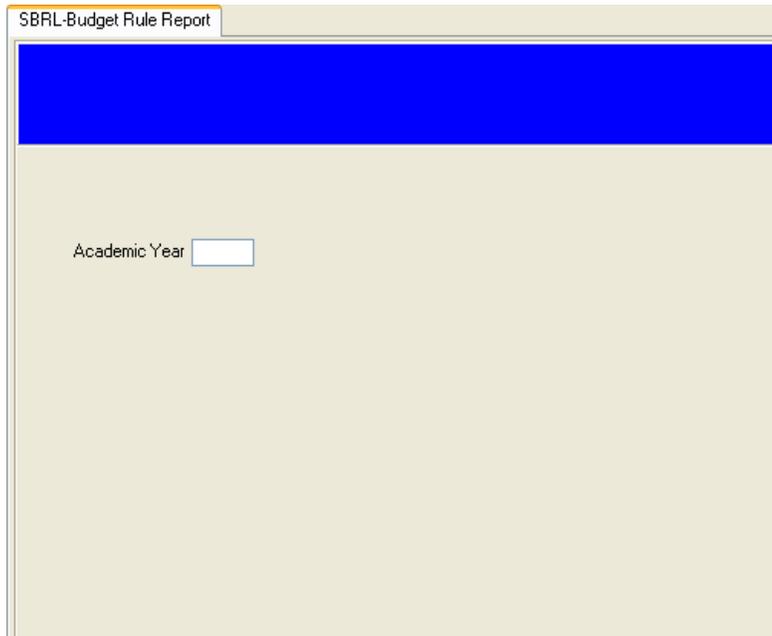
Overview

Use the Budget Rule Report (SBRL) form to generate a listing of all the budget rules for a selected year. This report shows the budget rules, including

- the resulting component codes for each rule
- each component's budget type, unit type, and unit cost

This report is useful to get a full perspective of a year's budget rules and component code information. It also helps you analyze your rules when you first define them to ensure that you have covered all the possible situations for building student budgets.

Sample Form



The image shows a screenshot of a web browser window titled "SBRL-Budget Rule Report". The window has a blue header bar. Below the header, the main content area is light beige and contains the text "Academic Year" followed by a small white input box.

Sample Report

Jul 13 1999
14:17

FA STUDENT BUDGET RULE DEFINITION
Academic Year: 1999

Page 1

Rules ID Description Office

Rule ID: UGCCBUD Description: Community College Budget Office Code:
Primary File View: APPLICANTS Comments:
Failure Message:

Connector	Left-hand Expression	Relation	Right-hand Expression
WITH	APPL.RESIDENCY.STATUS	EQ	"I"
WITH	STU.TYPES	EQ	"LH"

Comp. ID	Component Description	CB		Inst		Pell
		Unit Cost	Unit Type	Unit Cost	Unit Type	Cost
BOOKSCC	Books - CC Budget	700	YR	700	YR	700
LIVCC	Living Expenses - CC	2514	YR	2514	YR	2514
PRSNLCC	Personal Expenses - CC	1642	YR	1642	YR	1642
TRANSCC	Transportation - CC	1944	YR	1944	YR	1944
TUICC	Community College Tuition	1200	YR	1200	YR	1200

Rule ID: UGRESBUD Description: Undergrad/Resident Office Code: FA Financial Aid Office
Primary File View: SA.ACYR Comments:
Failure Message: XC

Connector	Left-hand Expression	Relation	Right-hand Expression
WITH	APPL.RESIDENCY.STATUS	EQ	'R','I','C'
WITH	ACAD.LEVELS.ID	EQ	'UG'
AND	STU.TYPES	NE	"CH1"

Comp. ID	Component Description	CB		Inst		Pell
		Unit Cost	Unit Type	Unit Cost	Unit Type	Cost
UGFTTU	Undergraduate Fulltime	6635	YR	6635	YR	6635
RMBRD	Room AND Board	1600	YR	1600	YR	1600
BKSFT	Bookstore Full Time	500	YR	500	YR	500
PRSNLUG	Personal Expenses Ug	1200	YR	1200	YR	1200

Sample Report

Jul 13 1999
14:17

FA STUDENT BUDGET RULE DEFINITION
Academic Year: 1999

Page 2

Rules ID Description Office

Rule ID: UGPTBUD Description: Undergraduate/Part-Time Office Code: FA Financial Aid Office
Primary File View: SA.ACYR Comments:
Failure Message:

Connector	Left-hand Expression	Relation	Right-hand Expression
WITH	ACAD.LEVELS.ID	EQ	'UG'
WITH	APPL.STUDENT.LOAD.INTENT	EQ	'H'
AND	STU.TYPES	NE	"CH1"

Comp. ID	Component Description	CB		Inst		Pell
		Unit Cost	Unit Type	Unit Cost	Unit Type	Cost
UGHTTU	Undergraduate Half Time	3340	YR	3340	YR	3340
BKSPT	Books & Supplies	500	YR	500	YR	500
PRSNLUG	Personal Expenses Ug	1200	YR	1200	YR	1200

Rule ID: GRAD/FT Description: Graduate Full Time Office Code: FA Financial Aid Office
Primary File View: SA.ACYR Comments:
Failure Message:

Connector	Left-hand Expression	Relation	Right-hand Expression
WITH	CS.DEPENDENCY.STATUS	EQ	'D'
WITH	ACAD.LEVELS.ID	EQ	'gr'
WITH	APPL.STUDENT.LOAD.INTENT	EQ	'F'

Comp. ID	Component Description	CB		Inst		Pell
		Unit Cost	Unit Type	Unit Cost	Unit Type	Cost
GRFTTU	Graduate Fulltime	4200	YR	4200	YR	4200
BKSGR	Books & Supplies	1000	YR	1000	YR	1000
RMBRD	Room AND Board	1600	YR	1600	YR	1600

END OF REPORT

Budget Rule Verification (SBRV)

Overview

Use the Budget Rule Verification (SBRV) form to generate a report that will verify all conditions of the rules for a given set of students for a given academic year. The report shows

- all of the rule details, along with the actual data values from the student's records
- a column to indicate if the student passes the current condition
- a column to indicate if the student passed the entire rule (a rule is a total set of conditions that have a total set of results).

This report is helpful for evaluating the set up of your rules prior to running the batch assignment process (from the Batch Budget Assignment [SBGT] form) or for troubleshooting budget assignments.

You can only run this report for years in which you used the standard rule processor for defining your budget assignment rules, and not a custom subroutine.

Before you can run this report, you must select the group of students for whom you want this report run. This selection is made on the ST Standard List/Select form.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Report in Phantom Mode

The last form that is displayed when you run this report is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in phantom (background) mode.

Sample Form

SBRV-Budget Rule Verification

Year: 2004

Academic Year **2004**

Saved List Name

Students

1	<input type="text"/>	
2	<input type="text"/>	
3	<input type="text"/>	
4	<input type="text"/>	
5	<input type="text"/>	
6	<input type="text"/>	
7	<input type="text"/>	
8	<input type="text"/>	
9	<input type="text"/>	
10	<input type="text"/>	
11	<input type="text"/>	

Additional Selection Criteria

Sample Report

June 24 1999		Student Rule Verification			Page 1
10:07AM		Academic Year: 1999			
0000001 Mr. Kenneth J. Smith					
Rule ID:	UGRESJCL	Ug Dorm Student Full-Time (jcl)	5 Components:	UGFTTU,RMBRD,BKSFT,TRANSPT,PRSNLUG	Rule Failed
Connector	Left-hand Expression	Value	Re	Right-hand Expression	Value

WITH	APPL.STUDENT.LOAD.INTENT	,	EQ	"F"	Fail
AND	APPL.ACAD.LEVEL	UG,UG	EQ	"UG"	Pass
AND	APPL.STUDENT.TYPE	01,	EQ	"DORM"	Fail

Rule ID:	UGTEST	Test for 1999 P1	3 Components:	PRSNLUG,RMBRD,UGFTTU	Rule Passed
Connector	Left-hand Expression	Value	Re	Right-hand Expression	Value

WITH	STU.CURRENT.ACAD.LEVELS	UG,CE	NE	'GR'	Pass

0000002 Mr. Casey McMichael					
Rule ID:	UGRESJCL	Ug Dorm Student Full-Time (jcl)	5 Components:	UGFTTU,RMBRD,BKSFT,TRANSPT,PRSNLUG	Rule Failed
Connector	Left-hand Expression	Value	Re	Right-hand Expression	Value

WITH	APPL.STUDENT.LOAD.INTENT		EQ	"F"	Fail
AND	APPL.ACAD.LEVEL	UG	EQ	"UG"	Pass
AND	APPL.STUDENT.TYPE	01	EQ	"DORM"	Fail

Rule ID:	UGTEST	Test for 1999 P1	3 Components:	PRSNLUG,RMBRD,UGFTTU	Rule Passed
Connector	Left-hand Expression	Value	Re	Right-hand Expression	Value

WITH	STU.CURRENT.ACAD.LEVELS	UG,CE	NE	'GR'	Pass

Unlinked Loan Applications (ULAP)

Overview

Use the Unlinked Loan Applications (ULAP) form to list unlinked Response File application records (EL.APP) that are not linked to a Colleague application. The import process uses the application ID in the imported CommonLine Response File record to determine which EL.APP record to populate.

In the absence of a Colleague application with a matching application ID, such as when your institution is not the originator of the loan application, Colleague uses special logic to attempt to link the CommonLine Response File data to a Colleague loan application.

If a link cannot be identified, the imported Response File application records remain unlinked. Colleague provides the following processes for managing the links between Colleague applications and imported Response File records.

- **Batch Link Elec Appls (LELA).** Link (or relink) Response File records to Colleague loan applications using the current linking parameters.
- **Unlink Elec Appls (UELA).** Unlink Colleague loan applications from their corresponding Response File records.
- **Terminate Unlinked Appls (TLAP).** Export a terminate request for unlinked Response File records.
- **Electronic Application Purge (ELPG).** Delete unlinked Response File and Disbursement Roster File records.
- **Unlinked Loan Applications (ULAP).** List unlinked Response File records by borrower Social Security number and application ID.

Sample Form

ULAP-Unlinked Loan Applications

Loan Detail

Input Saved List Name

Application Loan Type Code

Exclude Terminated

Additional Selection Criteria

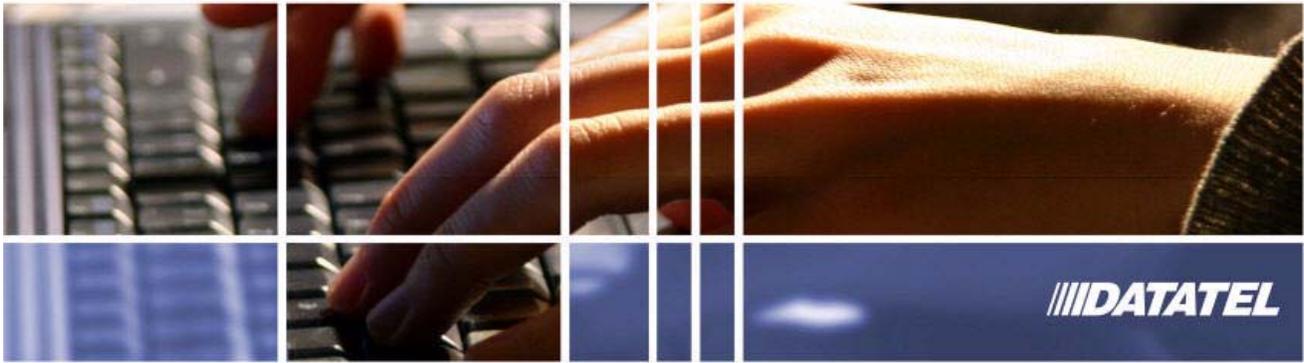
Sample Report

June 29 1999
 13:27

UNLINKED ELECTRONIC LOANS

Applications and their Loans

Period App ID	Ap Ty	Requested Amount	Borrower SSN	Borrower Name	Stu SSN Plus/Alt	Period Begin	End Date
0000380008d000050	PL	6,000	221334122	CAROL JENKINS	4444444444	09/01/98	08/20/99
1003000000d000021	CS	10,000	234823467	JAMES R. CUTHBERT		09/01/98	05/15/99
0031980000D001349	SU	5,500	254339544	MICHEL V. MILLER		09/19/98	05/28/99
0031980000D00134901	SU	5,500					
0000380008d000052	SU	17,000	456789012	DAVID WHEELER		09/01/98	05/20/99
0031980000D000587	SU	3,500	537081318	ALYSSA D. SCHUUR		09/02/98	05/28/99
0031980000D00058701	SU	3,500					
0031980000D000707	SF	5,500	540114821	CARL J. MUCKEN		09/02/98	05/28/99
0031980000D00070701	SF	5,500					
0031980000D000890	SF	2,625	540290387	KATHARINE M. POWELL		09/02/98	05/28/99
0031980000D00089001	SF	2,625					
0031980000D000656	SF	4,175	541721603	KAREN D. GIBBENS		09/02/98	05/28/99
0031980000D00065601	SF	4,175					
1003000000D000052		10,500	541888250	KIMBERLY M. CAMPO		06/13/98	05/28/99
1003000000D00005201	SF	10,500					
1003000000D00005202	SU	10,500					
0031980000D001355	CS	10,500	541888254	KIMBERLY M. CAMPO		06/13/98	05/28/99
0031980000D00135502	SU	10,500					
0031980000D00135501	SF	10,500					
0031980000D000522	CS	5,500	541987415	JENNIFER G. QUINNETT		09/02/98	05/28/99
0031980000D00052202	SU	5,500					
0031980000D00052201	SF	5,500					



Student System Sample Reports

Faculty Information Reports

Faculty Advisee Report (FAVR)

Overview

Use this report to create a listing of Advisees. It may be sorted in Student or Advisor sequence, and the course sections for each term selected may or may not be printed. Selection of students to be reported is driven off the STUDENT.TERMS file. It is that file against which all entries on the form and additional selection criteria is applied.

One important note: If a student does not have a STUDENT.TERMS record, they will not be selected for this report, even if their advisement date range falls within the terms or date ranges specified. If neither of those is specified, any STUDENT.TERMS record will pick up all advisors for a student.

Sample Form

FAVR-Faculty Advisee Report

Sort by Advisor **No**
Print Term Info **No**

Saved List Name

Begin End

Advising Dates  

Terms 
 

Advisors 
 

Students 
 

Acad Programs 
 

Acad Levels 
 

Additional Selection Criteria **No**

Sample Report

June 29 1999
13:48

FACULTY ADVISEE REPORT
For Advisor: Smith, Andrew

Page 3

ID	Student Name	Advisor	Start Date	End Date	Acad Level	Class	Enroll Status	Term	Course Sections	Cred
0000039	Brittenbach, David L	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG	FR	CG			
0000068	Daniels, Alex C	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			
0000066	Douglas, William T	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	CE UG VC		CU			
0000071	Fox, Maurlin L	Smith, Andrew Moore, Maria	09/01/98 01/24/99	12/20/98 01/24/99	UG		CU			
0000074	Kiley, Kristin A	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			
0000073	Kelly, Jason H	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			
0000072	Lozano, Phillip	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			
0000064	Thomas, James K	Smith, Andrew Moore, Maria	10/16/95 01/24/99	01/24/99	UG	FR	CU			
0000065	Thompson, Eileen	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	CE GR UG VC		CU			
0000067	Ullery, James P	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG VC		CU			
0000070	Underwood, Peggy A	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			
0000069	Van Buren, Curtis	Smith, Andrew Moore, Maria	06/07/96 01/24/99	01/24/99	UG		CU			

Faculty ID Cards (FAID)

Overview

Use the Faculty ID Cards (FAID) report to generate faculty ID cards. You can either print the cards or hold them on file and print at a later date.

You can either use a saved list of the faculty members you want to print ID cards for or enter individual faculty members. You can also enter selection criteria to narrow your list.

Sample Form

The screenshot shows a web-based form titled "FAID-Faculty ID Cards". The form has a blue header bar. Below the header, there is a "Form Name" field containing "FAC.ID.CARDS Faculty Id Cards".

The main form area is divided into two sections. The top section contains the following fields:

- Name/Address Hierarchy:
- Valid For Term:
- Valid From Date: with a calendar icon
- Valid To Date: with a calendar icon

The bottom section contains the following fields:

- Saved List Name:
- Faculty IDs: A list of two items, each with a small input box containing "1" and a dropdown arrow.
- Home Locations: A list of two items, each with a small input box containing "1" and a dropdown arrow.
- Ranks: A list of two items, each with a small input box containing "1" and a dropdown arrow.
- Special Statuses: A list of two items, each with a small input box containing "1" and a dropdown arrow.
- Additional Selection Criteria: A red button labeled "No".

Sample Report

0000188
234-87-6543
Mrs. Sally R. Lloyd

Valid For: 09/01/99 - 12/18/99
99/FA

0000056
564-78-2379
Mr. John Kulkin

Valid For: 09/01/99 - 12/18/99
99/FA

0000026
173-65-7901
Ms. Janice Loughran

Valid For: 09/01/99 - 12/18/99
99/FA

0000135
167-89-3025
Mr. Jacob Matteo

Valid For: 09/01/99 - 12/18/99
99/FA

Faculty Labels (FCLB)

Overview

Use the Institution Labels (INLA) process to generate labels for your institution. Colleague selects institutions for labels with the institution type and zip codes you specify on the form. The format for these labels is stored in a Communications Control Forms Processing record (INSTITUTION.LABELS).

The INLA process allows you to specify criteria and uses that information in conjunction with the form layout to select from the INSTITUTIONS file, creates a workfile for fields that must be sorted but are not accessible from those files (For example, zip code) and generates labels in the format specified.



Note: If you do not specify any limiting criteria, Colleague selects the entire INSTITUTIONS file for label printing.

If you want to select institutions by zip code, you can enter either a range of zip codes or specific zip codes, but not both.

The INLA process also sorts and creates a report for postal sorting if a postal sort code is entered and selects addresses according to specifications, including:

- Address hierarchy
- mail rules to include or exclude
- joint or individual mail

If an activity is specified, it will be updated with the number of pieces and the form ID. If history is to be updated, the mailing history file is updated with the form ID and the date mailed.



Note: This report will print alignment labels.

Sample Form

FCLB-Faculty Labels

Form Name **FAC.LABELS Faculty Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End
Zip	<input type="text"/>	<input type="text"/>
Student Advisors	<input type="text"/>	
Departments	<input type="text" value="1"/>	<input type="text"/>
Divisions	<input type="text" value="1"/>	<input type="text"/>
Zips	<input type="text" value="1"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

Mr. Casey McMichael
1232 Mclean Park Road
Falls Church VA 22043

Dr. Harold C. Brown, Ph.D
1360 Alm Street
Liberty MO 63021

Mr. David M. Coale, Box 1298
Room 201
Lee Hall
Fairfax VA 22033

Dr. Marilyn Franklin, Box 1265
Room 201
Heckert Hall
Ashburn VA 22011

Mr. Gabe Kotter
1069 Navy Rd.
Herndon VA 20170

Mr. Peter W. Larsen, Box 1256
Room 234
Heckert Hall
Ashburn VA 22011

Ms. Linda J. Nash, Box 1276
Room 200
Lee Hall
Fairfax VA 22033

Mr. John P. Anderson, Box 1273
Room 476
Heckert Hall
Ashburn VA 22011

Ms. Jacob Negit
222 Mallard Way
Fairfax VA 22033

Ms. Linda Lincoln
100 Ocean View
Pearl City CO 96782

Mr. Jeff Glassey
1317 Emerson St. NW
Annapolis, MD 33114

Ms. Nancy E Kribs, Box 1200
Room 123
Lee Hall
Fairfax VA 22033

Simon S. Lebon
Room 302
Lee Hall
Fairfax VA 22033

Mr. Bryan Noe
14680 Clemstone Dr.
Platte City MO 64079

Dr. James Baker
Room 101
Anderson Hall
Annadale VA 22003

Mr. Steven Carver
Room 110
Reston VA 22222

Mr. Paul Ellison
45 Liberty Way
Williamsburg VA 23987

Mr. Stephen E. Grimm
Box 1263
123 First Street
Ashburn VA 22011

Ms. Gretchen Beckley
4375 Fair Lakes Court
Fairfax VA 22033

Tim Moore
123 Banner Ct.
Reston VA 22222

Mr. Dennis A. O'Neil
P.O. Box 122
Fairfax VA 22033

Faculty Missing Contracts (FMCR)

Overview

Use the Faculty Missing Contracts Report (FMCR) form to generate a listing of assignments (both instructional and non-instructional) for faculty members that do not have contracts associated with them. You can run this report for a specified date range as well as select only those faculty members without records on your HR application.

Sample Form

The screenshot shows the 'FMCR-Faculty Missing Contracts' form. At the top, there is a blue header bar. Below it, the 'Start/End Date' field is redacted with a black box. To the right, the 'Sort Order' is set to 'DEPT By Department' with a dropdown arrow. Below that, the 'HR Unknowns Only' field is set to 'No' in a red box. The main section of the form contains several filter categories, each with two input fields (labeled '1' and '2') and a list of items with up/down arrows:

- Saved List Name: [Empty text box]
- Departments Incl: [1] [2] [List of departments]
- Departments Excl: [1] [2] [List of departments]
- Divisions Incl: [1] [2] [List of divisions]
- Divisions Excl: [1] [2] [List of divisions]
- Schools: [1] [2] [List of schools]
- Home Locations: [1] [2] [List of home locations]
- Faculty Members: [1] [2] [List of faculty members]

At the bottom, the 'Additional Selection Criteria' field is redacted with a black box.

Sample Report

June 29 1999
09:10:07

Missing Faculty Contracts
98/07/01-99/06/30

Page 2

LOCATION...:

----- Instructional Assignments -----

INSTRUCTOR	ID	COURSE SECTION	TERM	INSTR	START		END	LOAD
					DATE	DATE	DATE	
Braun Candy	0000264	AGRIC-100-01	98/FA Fall Semester '98	LEC	09/01/98	12/19/98		3.00
		AGRIC-100-02	98/FA Fall Semester '98	LEC	09/01/98	12/19/98		3.00
		AGRIC-100-02L	98/FA Fall Semester '98	LAB	09/01/98	12/19/98		3.00
		AGRIC-100-03	98/FA Fall Semester '98	LEC	09/01/98	12/19/98		3.00
		PHIL-101-01	99/SP Spring Semester '99	LEC	01/20/99	05/20/99		3.00
		PHIL-101-02	99/SP Spring Semester '99	LEC	01/20/99	05/20/99		3.00
		PHIL-2001-01	99/SP Spring Semester '99	LEC	01/20/99	05/20/99		3.00

----- Non-Instructional Assignments -----

CAMPUS ORGANIZATION	ROLE	START		END	LOAD
		DATE	DATE	DATE	
Ski Club	MEM Membership Director	09/29/97	12/31/98		

Faculty Workload (FWLR)

Overview

Use the Faculty Work Load Report (FWLR) form to generate a listing of faculty members' active assignments (both instructional and non-instructional) for a specified date range. The report includes the total load for the instructor, but it does not provide any overload or underload conditions. This information can be provided by Colleague's HR application.

The report will not show any faculty members that have no assignments at all in the specified date range.

Sample Form

The screenshot shows the 'FWLR-Faculty Workload' form. At the top, there is a blue header bar. Below it, the 'Start/End Date' field is highlighted in red, with two calendar icons. To the right, the 'Sort Order' is set to 'DEPT By Department' in a dropdown menu. Below that, the 'Summary/Detail' dropdown is set to 'D Detail'. The main section of the form contains several filter categories, each with two input fields (labeled '1' and '2') and a list of arrows for selection: 'Departments Incl', 'Departments Excl', 'Divisions Incl', 'Divisions Excl', 'Schools', 'Home Locations', and 'Faculty Members'. At the bottom, the 'Additional Selection Criteria' field is highlighted in red and contains the text 'No'.

Sample Summary Report

1999 June 29
09:10:07

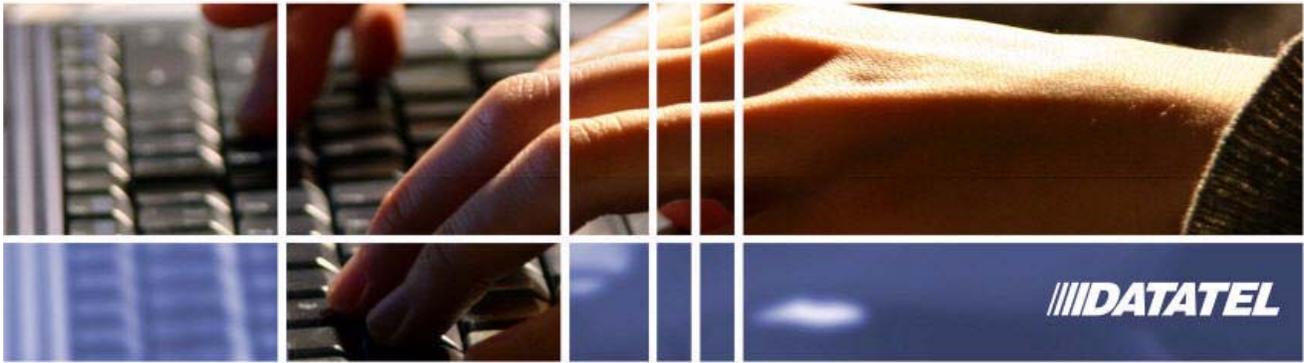
Faculty Workload
07/01/98-06/30/99

Page 1

DEPARTMENT: Academic Affairs
DIVISION...:
SCHOOL.....:
INSTRUCTOR
Braun Candy

ID
0000264

Instructional Assignment Totals: 102.00 315.00
Non-Instructional Assignment Totals:
Instructor Totals: 102.00 315.00



Student System Sample Reports

Registration Reports

Add/Drop/Withdrawal Roster (ADRR)

Overview

Use the Add/Drop/Withdrawal Roster (ADRR) process to obtain a roster of students in a selected list of course sections. This roster can contain students who have added or dropped the section or who are waitlisted for it.

You must define your desired print options, including

- whether the printed report should display SSN or ID number
- whether report should be printed double spaced
- whether to include cross listed courses (if no, if Colleague should print the cross list reference at bottom of report)
- whether to include dropped and withdrawn students
- whether to include waitlisted students

If you use a saved list, it must contain record IDs from the COURSE.SECTIONS file.

Sample Form

ADRR-Add/Drop/Withdrawal Roster

SSN or ID ID Print Dropped/Withdrawn No

Double-space No Print Waitlisted No

Separate Cross-List Yes

Print Cross-List Ref

Saved List Name

Begin End

Section Date

Terms 1

Faculty Members 1

Departments 1

Subjects 1

Courses 1

Sections 1

Locations 1

Additional Selection Criteria No

Sample Report

1999 June 23
10:46

ADD/DROP/WITHDRAWAL ROSTER
99/FA

Page 4

Section.....: BIOL-101-1 Principles of Biology
Instructors: TBA

----- Schedule -----
09/01/99 12/19/99 FORD 013 LEC M 09:00AM 10:00AM
09/01/99 12/19/99 BECK 221 LAB M 11:00AM 01:00PM

ID	Student Name	Original Course Status	Original Course Date	Current Course Status	Current Course Date	Class	Absences to date	Excused Absences to date
0018668	Mr. Kyle Hadyn	New	02/22/99	New	02/22/99	SO	0	0
0018687	Miss Kelly Jacks	New	02/24/99	New	02/24/99	FR	0	0
0018667	Mr. Michael Loughran	New	02/22/99	Add	02/22/99	FR	0	0
0018661	Mr. Matthew Masson	New	02/22/99	New	02/22/99	JR	0	0
0018662	Miss Kathryn Mahoney	New	02/22/99	New	02/22/99	FR	0	0
0018670	Ms. Janet Nanni	New	02/23/99	Drop	02/23/99	SR	0	0
0018666	Mr. Robert O'Neil	New	02/22/99	New	02/22/99	SO	0	0
0018660	Mr. Christopher Parker	New	02/22/99	New	02/22/99	JR	0	0
0018669	Mr. Jonathan Patton	New	02/22/99	Add	02/22/99	FR	0	0
0018663	Mr. Jacob Priest	New	02/22/99	New	02/22/99	FR	0	0
0018675	Mr. Raymond Pryor	New	02/24/99	Add	02/24/99	SR	0	0
0018664	Mr. Bradford Riley	New	02/22/99	New	02/22/99	FR	0	0
0018682	Miss Erica Stryker	New	02/24/99	New	02/24/99	SO	0	0
0018665	Miss Jenifer Sullen	New	02/22/99	Drop	02/22/99	SO	0	0
0018806	Miss Tracy Tucker	New	04/14/99	New	04/14/99	SO	0	0
0018805	Miss Jackie Watton	New	04/14/99	Add	04/14/99	SR	0	0
0016225	Mr. Rodman Wiley	New	02/22/99	Add	02/22/99	FR	0	0

Total Current Adds.....: 5
Total Current Drops.....: 2
Total Current Withdrawals: 0

Enrollment Statistics (ENST)

Overview

Use the Enrollment Statistics (ENST) process to generate a report displaying statistics about enrollment during a given time period.

This process selects records from the COURSE.SECTIONS file.

You can choose course sections by either term or start and end date. For example, if you want all the course sections for a particular term, enter that term in the Term field. The start and end dates associated with that term are displayed on the form in inquiry mode.

The report generated from this process will total, break, and sort by section term, department, division, and school.

Sample Form

ENST-Enrollment Statistics

Census Date **02/25/09**

Saved List Name

Term

Start Dt End Dt

Start/End Date

Location

Department

Division

School

Additional Selection Criteria **No**

Sample Report

June 24 1999
14:43

ENROLLMENT STATISTICS

Term.....: 99/FA
School.....:
Division...: Natural Sciences
Department: Mathematics

Course	Synonym	Title	Instructor	Instr Meth	Max	Used	Avail	Wait	Cens	Creds	CEUs	Total Creds	Total CEUs

GEOM-100-01	0016	Intro to Geomet	Dr. Jacob Kneely		25	2	-2	0	2	3.00		6.00	0.00
ALGE-201-01	0099	Algebra II	Mr. Jack Knolls		102	17	-17	0	17	3.00		51.00	0.00
CALC-200-01	0100	Calculus I	Ms. Carey Williams		30	16	-16	0	16	3.00		48.00	0.00
CALC-201	0127	Calculus II	Ms. Carey Williams		21	1	-1	0	1	3.00		3.00	0.00
CALC-202-01	0133	Calculus III	Mr. Nick Glassey		40	0	40	0	0	3.00		0.00	0.00
MATH-STAT-321	0141	Statistics	Miss Kelly Truman		57	0	0	0	0	3.00		0.00	0.00
MATH-THEOR-301	0142	Theories of Mat	Mrs. Kathy Neely		65	0	0	0	0	3.00		0.00	0.00
MATH-300-01	0149	Discrete I	Mr. Robert Rieger		10	1	9	0	1	3.00		3.00	0.00
ALGE-251-02	0152	Advanced Algebr	Mr. Jack Knolls		19	1	18	0	1	3.00		3.00	0.00
TRIG-100	0156	Trigonometry	Mr. Bob Sherman		76	2	-2	0	2	3.00		6.00	0.00
MATH-250-02	0164	Finite Mathemat	Mrs. Kathy Reed		90	0	0	1	0	3.00		0.00	0.00
GEOM-201-01	0176	Advanced Geomet	Dr. Jacob Kneely		198	0	0	0	0	3.00		0.00	0.00
MATH-ANAL-220	0177	Analysis I	Miss Kelly Truman		37	0	0	0	0	3.00		0.00	0.00
ALGE-249-01	0179	Linear Algebra	Mr. Jack Knolls		35	0	0	0	0	12.00		0.00	0.00
					=====	=====	=====	=====	=====				
					805	40	29	1	40				

Reg Activity Analysis (RGAA)

Overview

Use the Reg Activity Analysis (RGAA) process to select criteria for records in the COURSE.SECTIONS file.

If you enter **Y** in the Consolidate Cross Listed Sections field, then course sections that are cross listed together are displayed only by the primary section (even if that primary course section was not part of the selected list). The primary section has two asterisks next to its name and all calculations are based on the activity of registration in all of the course sections in its cross list.

For example,

EF#81#01 ** <registration activity data>

** EF#81#01 is the primary section of cross list including: EF#101#01

If you enter **N** in the Consolidate Cross Listed Sections field, then each cross listed section is displayed and registration activity is calculated independently for each section.

You must enter either terms or a start/end date range in this form. When you enter terms, Colleague selects only course sections with those terms. The report will display activity between the term start date and end date. It will display a number of actual (registered students) and available (capacity - actual) based on term end date. When you enter a start/end date range, Colleague uses these dates to select course sections that were active at the time of the end date. The report will display activity during the time frame of the start/end dates as well as a number of actual (registered students) and available (capacity - actual) based on the end date.



Note: When you enter a start/end date range, validation on these dates is done during the batch run. In such a case, the bar graph may display a number higher than the actual number of course sections displayed on the report. Validation is done during the batch, instead of during the regular list specification, to check for any overlap between the dates and the course section start/end dates, and to check for an active course section status based on the end date of the form.

Registration Reports: Reg Activity Analysis (RGAA)

In the report, the column labeled "Reg" indicates the sum of the five registration activity columns, that is, registration activity (new, add, drop, withdraw, delete) during the specified time period. Note that any deleted counts never include any records that were physically deleted (where the record delete was used). The counts only reflect those records with a status whose special processing code denotes a delete (has a special processing code = "X" in the STUDENT.ACAD.CRED.STATUSSES validation code table).

Sample Form

RGAA-Reg Activity Analysis

Consolidate Cross Listed Sections

Saved List Name

Terms

Start Dt
End Dt

Start/End Date

Locations

Departments

Additional Selection Criteria No

Sample Report

Jul 22 1999 11:14		REG ACTIVITY ANALYSIS with Consolidated Cross-Lists								Page 1	
Term/Dates: 99/FA 08/25/99-12/15/99											
Department: 200											
Location..:											
Course Section	Reg *	New/%	Add/%	Dropped/%	Withdrawn/%	Deleted/%	Cap	Actual/ %Used	Available/ %Not Used		
200-21121-001	135	100/ 74.07	12/ 8.89	13/ 9.63	10/ 7.41	0/ 0.00		0/ 0.00	155/ 22.00		
BUS-110-01	24	12/ 50.00	2/ 8.33	3/ 12.50	4/ 16.67	3/ 12.50	40	3/ 7.50	37/ 92.50		
BUS-120-01	37	20/ 54.05	11/ 29.73	6/ 16.22	0/ 0.00	0/ 0.00	40	3/ 7.50	37/ 92.50		
BUS-120-02	91	45/ 49.45	10/ 10.99	15/ 16.48	20/ 21.98	1/ 1.10	40	0/ 0.00	40/100.00		
BUS-205-01	2	1/ 50.00	1/ 50.00	0/ 0.00	0/ 0.00	0/ 0.00	35	2/ 5.71	33/ 94.29		
BUS-301-01	3	1/ 33.33	1/ 33.33	0/ 0.00	0/ 0.00	1/ 33.33	40	0/ 0.00	40/100.00		
BUS-365-01	11	5/ 45.45	2/ 18.18	3/ 27.27	1/ 9.09	0/ 0.00	30	9/ 30.00	21/ 70.00		
BUS-445-01	104	75/ 72.12	9/ 8.65	10/ 9.62	5/ 4.81	5/ 4.81	30	0/ 0.00	30/100.00		
BUS-457-02	23	11/ 47.83	3/ 13.04	7/ 30.43	2/ 8.70	0/ 0.00	70	0/ 0.00	70/100.00		
BUS-90-2	37	15/ 40.54	1/ 2.70	4/ 10.81	13/ 35.14	4/ 10.81		1/	/		
=====											
Total Number of Sections = 10											
* Reg = The number of students that have had registration activity in the listed course section.											

Registration Statement Print (RGST)

Overview

Use the Registration Statement Print (RGST) form to generate a printed record of a student's schedule and tuition charges. You can use these statements to request payment for the tuition and other charges.

Select the accounts you want statements printed for by using a saved list of IDs from the REG.AR.POSTINGS file, the selection options on the RGST form, or a combination of these options.

Specifying Output Options

After you exit this form, the Change Peripheral Defaults form is displayed. Use the Change Peripheral Defaults form to specify output to the printer or the terminal and to set other printer characteristics.

Running This Process in Phantom Mode

The last form that is displayed when you run this process is the Phantom Mode Specification form. Use this form to specify whether or not you want to run the process in the phantom (background) mode.

Sample Form

RGST-Registration Statement Print

Print only new **Yes**

Sort Sequence ZIP

Mail Rules for Addnl Copies 1

Reg User Group

Message Lines

1

2

Saved List Name

Start/End Date

Terms 1

2

Students 1

2

AR Types 1

2

Additional Selection Criteria **No**

Sample Summary Report

07/07/99 02:42PM	Registration Statement Print	Page 1
Student	Mail To	Registration
ID 0018224 Mr. Jonathan Davis	Mr. Jonathan Davis	Term.....: FA/99 09/01/99-12/19/99 Date.....: 08/07/98 Residency.....: I In State Academic Program(s): UG.UNDEC
Advisor: Miss Abby MacEntire Office.: BH 202		Ant Degree.....: AA Ant Cmpl Date.....: None
 SCHEDULE		
Course		Credits STC
Instructor	Days Meeting Times Location Bldg/Room	Meth Start Date CEUs Stat

Accounting Principles	MWF 09:00AM-09:50AM BU 202	LEC 09/01/99 3.00cr New
Technical Writing	TTH 02:00PM-03:15PM WH 301	09/01/99 3.00cr Dropp
Intro to Biology	MTWTH 11:00AM-12:00PM CO 392	LAB 09/01/99 4.00cr Wait
Business Math	TW 05:00PM-06:15PM BU 400	LEC 09/01/99 3.00cr New
 CHARGES		
Date	Number Code Description	Charge Credit

03/11/99	000002802 Registration - 99/FA	
	ACT Student Government	15.00
	HLT Health Service Fee	166.00
	TPT Tuition Part Time	750.00

	Total:	931.00 0.00
Invoice Net.....:	931.00	
Sponsor Payments.....:	0.00	
FA Payments.....:	0.00	
Payment Plans.....:	0.00	
Deposit Allocations..:	0.00	
Cash Payments.....:	0.00	

Sample Detail Report

07/07/99 10:13AM

Registration Statement Print

Page 1

Student	Mail To	Registration
ID 0018224	Mr. Jonathan Davis	Term.....: FA/99 09/01/99-12/19/99
Mr. Jonathan Davis		Date.....: 08/07/98
		Residency.....: I In State
		Academic Program(s): UG.UNDEC
		Ant Degree.....: AA
Advisor: Miss Abby MacEntire		Ant Cmpl Date.....: None
Office.: BH 202		

SCHEDULE

Course	Days	Meeting Times	Location Bldg/Room	Inst Meth	Start Date	Credits STC
Instructor						CEUs Stat
ACCT-101-01	MWF	09:00AM-09:50AM	BU 202	LEC	09/01/99	3.00cr New
Accounting Principles						
ENGL-231	TTH	02:00PM-03:15PM	WH 301		09/01/99	3.00cr Dropp
Technical Writing						
BIOL-100-02	MTWTH	11:00AM-12:00PM	CO 392	LAB	09/01/99	4.00cr Wait
Intro to Biology						
MATH-200-01	TW	05:00PM-06:15PM	BU 400	LEC	09/01/99	3.00cr New
Business Math						

CHARGES

Date	Number	Code	Description	Charge	Credit
03/11/99	000002802		Registration - 99/FA		
		ACT	Student Government	15.00	
		HLT	Health Service Fee	166.00	
		TPT	Tuition Part Time	750.00	
			Total:	931.00	0.00

Invoice Net.....:	931.00
Sponsor Payments.....:	0.00
FA Payments.....:	0.00
Payment Plans.....:	0.00

Repeated Course Sections (RPCS)

Overview

Use the Repeated Course Sections (RPCS) process to produce a report listing students repeating a course within a certain time frame.

The RPCS process selects off of the STUDENT.ACAD.CRED file.

The report is sorted by student name and displays the following for each instance of a repeated course:

- Student name
- Term
- Start and end date
- Credit type
- Completed credits
- Verified grade
- Registration retake policy
- Replaced code

If a student has more than one group of retakes, an empty line distinguishes the break between retake groups on the printed report.

Sample Form

RPCS-Repeated Course Sections

Saved List Name

Terms

Reporting Terms

Start Date 

End Date 

Students

Courses

Course Sections

Subjects

Departments

Addnl Selection Criteria

Sample Report

Jul 12 1999
15:57

REPEATED COURSE SECTIONS

Page 2

Name	Term	Course Section	Start Dt	End Dt	Cred Type	Cmpl Cred	Reg Grade	Retake Policy	Replaced Code

Mr. Matthew A. Aldrey, II	99/FA	EDU-200-1	08/25/99	12/15/99	1 Institutional			4 No-Retakes	
	97/FA	EDU-200-1	09/09/97	12/15/97	1 Institutional	3.00	A	4 No-Retakes	
	98/FA	EDU-200-1	09/09/98	12/15/98	1 Institutional			4 No-Retakes	
Mr. Matthew A. Aldrey, II			08/01/92	08/01/92	1 Institutional				
			08/15/91	05/23/92	1 Institutional	3.00			
Mr. Matthew A. Aldrey, II	97/FA	EDU-200-1	09/09/97	12/15/97	1 Institutional	3.00	A	4 No-Retakes	
	98/FA	EDU-200-1	09/09/98	12/15/98	1 Institutional			4 No-Retakes	
	99/FA	EDU-200-1	08/25/99	12/15/99	1 Institutional			4 No-Retakes	
Mr. Matthew A. Aldrey, II			08/15/91	05/23/92	1 Institutional	3.00			
			08/01/92	08/01/92	1 Institutional				
Mr. Michael Alonzo	99/FA	EDU-200-2	08/25/99	12/15/99	1 Institutional	3.00	A	4 No-Retakes	
	97/FA	EDU-200-1	09/09/97	12/15/97	1 Institutional			4 No-Retakes	
Mr. Michael Alonzo	97/FA	EDU-200-1	09/09/97	12/15/97	1 Institutional			4 No-Retakes	
	99/FA	EDU-200-2	08/25/99	12/15/99	1 Institutional	3.00	A	4 No-Retakes	
Ms. Margaret M. Atkinson	98/SP	ACCT-113-01	01/04/98	05/20/98	1 Institutional	3.00	A	3 All	
	99/SP	ACCT-113-03	01/03/99	05/23/99	1 Institutional			3 All	
Ms. Margaret M. Atkinson	99/SP	ACCT-113-03	01/03/99	05/23/99	1 Institutional			3 All	
	98/SP	ACCT-113-01	01/04/98	05/20/98	1 Institutional	3.00	A	3 All	
Lena Barren	92/SP	ENGL-201-01	01/02/92	05/15/92	1 Institutional			3 All	
	91/SP	ENGL-201-03	01/15/91	04/15/91	1 Institutional	3.00	B		
Lena Barren	91/SP	ENGL-200-00	01/15/91	04/15/91	1 Institutional	3.00	B		
	92/SP	ENGL-201-01	01/02/92	05/15/92	1 Institutional			3 All	

Registration Reports: Repeated Course Sections (RPCS)

Requisite Mismatch (RQMM)

Overview

Use the Requisite Mismatch (RQMM) form to set up the criteria for running the Requisite Mismatch report, that lists all mismatches between the prerequisite courses, corequisite courses, corequisite sections, and corequisite noncourses required for a course section and what the student actually has.

The RQMM process selects records from the STUDENT.COURSE.SEC file and compares the requirements for the section to the student's academic record. If any prerequisites or corequisites have not been taken, the mismatches are listed on the printed report.

You must enter either yes or no to the following fields:

- Print Prerequisites
- Print Corequisites
- Sort by Course

If you enter a saved list, it must contain IDs from the STUDENT.COURSE.SEC file. Any other criteria you select further limits this list.

Sample Form

RQMM-Requisite Mismatch

Print Prerequisites Sort by Course

Print Corequisites

Saved List Name

Section Dates Begin End

Course Terms 1

Courses 1

Course Sections 1

Course Locations 1

Students 1

Academic Programs 1

Academic Level

Add'l Select Criteria No

Sample Report

Jul 6 1999
10:26

REQUISITE MISMATCH

Page 2

Term:

Prerequisites (P)/
Corequisite Courses (C)/
Corequisite Sections (S)/

- - - Enrolled/Completed - - -
Courses Start Term Gr

Student Name / Course Section

Corequisite Non-courses (N)

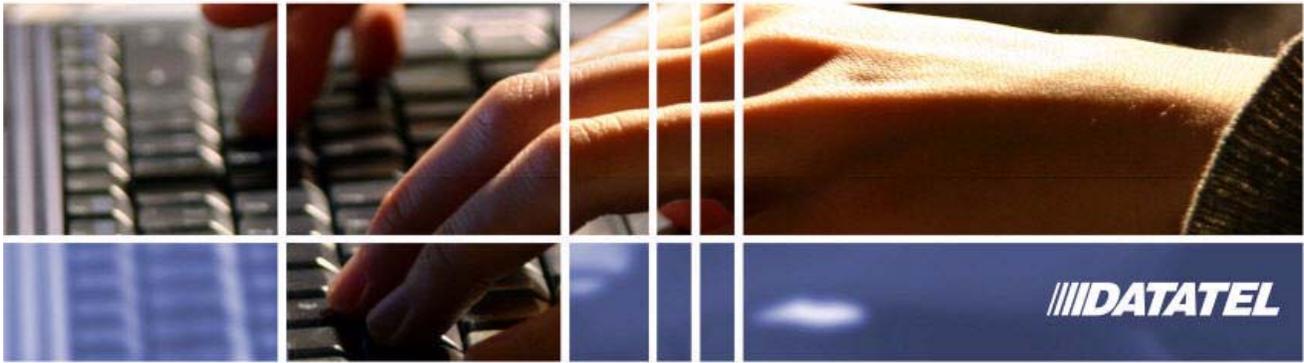
Dunlap, Adam M.
AMHIST*205*2000

(P)
Take HIST*116;
Minimum grade C+;

ENGL*101*01

(P)
Take ENG*95 ENG*98 ENG*99 or ACT*99;
Minimum grade C+;

Take RDG*88 or RDG*89;
Minimum grade B



Student System Sample Reports

Residence Life Reports

Meal Plan Assignment Notice (MEAL)

Overview

Use the Meal Plan Assignment Notice (MEAL) form to generate and either print or file meal plan assignment notices.

Sample Form

The screenshot shows a web-based form titled "MEAL-Meal Plan Assignment Notice". The form is divided into two main sections. The top section contains the following fields: "Name/Address Hierarchy" (a redacted field), "Mail Rules for Addnl Copies" (a dropdown menu with "1" selected), "Sort Sequence" (a dropdown menu with "2" selected), and "Sort Sequence" (a dropdown menu). The bottom section contains the following fields: "Saved List Name" (a text input field), "Date Range" (with "Begin" and "End" labels and calendar icons), "Term" (a dropdown menu with "1" selected), and "Additional Selection Criteria" (a dropdown menu with "No" selected).

Sample Report

Meal Plan Assignment Notice
 Person ID: 0015851
 SSN: 156-89-3264
 John Jung

Meal Plan	Term	Start Date	End Date	No. of Rate Periods	Meal Card
-----	-----	-----	-----	-----	-----
Daily - 3 Meals	99/SP	01/19/99	05/23/99	1	
Daily - 3 Meals	99/FA	08/26/99	12/21/99	1	

Meal Plan Assignment Labels (MPLA)

Overview

Use the Meal Plan Assignment Labels (MPLA) form to generate and print labels for meal plan assignments. You can either send the labels to a printer or to a hold file.



Note: This report prints alignment labels.

Sample Form

MPLA-Meal Plan Assignment Labels

Form Name **MPLAN.LABELS Meal Plan Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection

Saved List Name

Begin End

Zip

Assignment Date

Terms

Meal Plans

Include Statuses

Exclude Statuses

Zips

Additional Selection Criteria

Sample Report

0000017
145-74-5689
Mr. Hugh Smith
1069 Nicklaus Court
Herndon VA 20170

0000511
555-46-7898
Mr. Hank Grover
108 Fox Creek Road
Newburgh Ny 12550

0015655
538-46-7801
Mr. Richard Nanni
10 Carol Grove
Richmond VA 20934

0015852
456-79-3015
Mr. Christopher Priest
6098 Stoney Hill Road
Allentown PA 18938

0016325
231-56-8972
Mr. Robert Rieger
897 James Street
Northport NY 39475f

0051122
226-54-2166
Mr. Richard Glassey, Jr.
3410 Valewood Drive
Oakton VA 22124

0000186
575-82-0144
Miss Allison Mack
229 Harrison Drive
Alexandria VA 99283

0000621
283-74-4444
Mr. Paul W. Engel
876 Park Street
Fairfax VA 20170

0015849
213-56-4978
Mr. Robert Williams
99 Fair Banks Road
Baltimore MD 23953

0015853
452-01-5978
Miss Kathryn Webber
183 Childs Road
Charleston SC 39210

0017684
132-56-7012
Miss Maria Moore
98 Tenth Street
Bloomington MN 89321

0051208
102-65-8971
Ms. Melissa Smith
487 Carlton Way
Norfolk VA 39271

0000328
678-09-7897
Ms. Holly Perkson
9826 High Street
Allentown PA 18938

0015650
535-94-1488
Ms. Kathie Kitchen
1 Kingswoods Drive
Reston VA 20195

0015851
759-20-3649
Mr. Harold Jacobs
873 Fountain Lane
Greensboro NC 59321

0015926
620-45-1297
Ms. Carolyn Shoemucker
773 Main Street
Raleigh NC 59203

0018946
198-46-0257
Mr. Ryan Nystrom
9485 Summit Manor Court
Fairfax VA 22033

0068978
135-89-4204
Miss Kimberly Offerman
897 Toledo Lane
Indianapolis IN 47483

Room Assignment/Student Load (RASL)

Overview

Use the Room Assignment/Student Load (RASL) form to generate a list of room assignments. The generated list may select by one or more of the following criteria; academic terms, building types, student academic levels, student loads, student term statuses, or additional selection criteria entered on a detail form. None of the selection criteria are required, and more than one selection may be made for each. (Example: select both Fall and Spring terms or more than one building type, or several Academic levels, but do not specify student term statuses or room assignment statuses.) The 'include statuses' field automatically excludes all statuses not selected, so the user cannot simultaneously use the 'include' and 'exclude' criteria for Room Assignment Statuses and Student Term Statuses.

Sample Form

RASL-Room Assignment/Student Load

Saved List Name

Term

Building Types

Incl Room Assignment Statuses

Excl Room Assignment Statuses

Student Acad Levels

Student Loads

Incl Student Term Statuses

Excl Student Term Statuses

Additional Selection Criteria

Sample Report

July 13 1999 08:59		ROOM ASSIGNMENT/STUDENT LOAD Term: 99/FA 1999					Page 1		
ID	Student Name	Bldg	Room	Start Dt	End Dt	Room Assignment Status	Acad Level	Student	Load

0001159	Atkins, Bernard	JEFF	120	08/15/99	12/21/99	Assigned	UG	P	Part Time
							UG	O	Overload
0015681	Banks, Jerry	DUNN	309	08/15/99	12/21/99	Terminated	UG	P	Part Time
							UG	F	Full Time
0015851	Bigelow, Harry	JEFF	100	08/15/99	12/21/99	Assigned			
0016043	Gills, John M.	WEBB	05	08/15/99	12/21/99	Cancelled	UG	F	Full Time
							UG	P	Part Time
0017118	Glass, Julie	LEE	201	08/15/99	12/21/99	Cancelled			
0016044	Glassey, Sara J.	WEBB	101	08/15/99	12/21/99	Assigned	UG	P	Part Time
							UG	P	Part Time
0016046	Goldmann, Stacy A.	LEE	201	08/15/99	12/21/99	Cancelled	UG	F	Full Time
0016220	Kurtz, Chris	INT	201	09/01/99	12/20/99	Reserved	UG	F	Full Time
							UG	P	Part Time
0018425	Loughran, Michael	DUNN	300	09/01/99	12/21/99	Assigned			
0018423	MacElroy, John L.	DUNN	300	08/15/99	12/21/99	Assigned			
0018424	Meen, Laverne M.	DUNN	305	08/15/99	12/21/99	Assigned			
0016565	Mettle, Maureen	INT	100	08/15/99	12/21/99	Cancelled	UG	P	Part Time
0016229	Morgan, Joe	INT	101	08/24/99	12/30/99	Cancelled	UG	F	Full Time
							UG	P	Part Time
0017011	O'Neal, Stacy	LEE	101	08/15/99	12/21/99	Cancelled			
0016610	Redd, Connor	INT	301	08/15/99	12/21/99	Reserved	UG	P	Part Time
							UG	P	Part Time
0000364	Sanns, Abdul	BARK	001	08/15/99	12/21/99	Assigned	UG	F	Full Time
0016212	Striker, Assad	INT	201	09/01/99	12/20/99	Reserved	UG	F	Full Time
							UG	P	Part Time
0016212	Summet, Assad	JEFF	100	09/01/99	12/20/99	Reserved	UG	F	Full Time
							UG	F	Full Time
0016425	Storms, Bailey	JEFF	301	08/15/99	12/21/99	Cancelled	UG	P	Part Time
0016202	Underwood, Henry J.	BARK	003	08/15/99	12/21/99	Assigned	UG	O	Overload
							UG	F	Full Time
0017010	Ween, Karen G.	WEBB	110	08/15/99	12/21/99	Cancelled			
0016056	Ween, Nancy J.	JEFF	101	08/15/99	12/21/99	Reserved	UG	P	Part Time
							UG	O	Overload
0018010	Wiley, Brian A.	THOR	012	08/15/99	12/21/99	Assigned			
0018113	Wiley, Kenneth A.	THOR	012	08/15/99	12/21/99	Assigned	UG	F	Full Time

Resident Directory (RESID)

Overview

Use the Resident Directory (RESID) form to generate a report for RA, housing office or students.

Sample Form

RESID-Resident Directory

Report Subtitle

Print ID Yes

Print Emergency Contact Yes

Print Birth Date No

Sort by Room Coordinator No

Sort by Wing No

Saved List Name

Begin End

Assignment Date

Terms

Buildings

Floors

Wings

Room Coordinators

Directory Codes Incl

Directory Codes Excl

Additional Selection Criteria No

Sample Report

Jul 13 1999
09:44

RESIDENT DIRECTORY

Page 1

Building.....: WEBB Webb Hall

Start Dt/
Room No

Resident / E-Mail Address

Phone

Box Number

End Dt

Room No	Resident / E-Mail Address	Phone	Box Number	End Dt
101	0000240 Elroy, Susan Elaine Contact: Edward Siegrist	549-3325 (203) 857-6363	Box 00101	09/14/99 12/01/99
101	0000241 Leonard, Paula Sue Contact: Randy Kyle	549-3325 (304) 876-3900	Box 00101	09/14/99 12/01/99
110	0000073 Killings, Mary Brigid Contact: Mrs. Harriett Kiley	549-2010 (703) 555-1212	Box 00110	09/14/99 12/01/99
201	0000282 Felling, Bradley C. Contact: Jackie Niess	549-6659 (703) 802-8765	Box 00201	09/14/99 12/01/99
201	0000238 Mattingly, Donald H. Contact: Kelly Truman	549-6659 (703) 278-6542	Box 00201	09/14/99 12/01/99
205	0000266 Duggins, Allen Contact: Mary Houston	549-0382 (703) 709-7839	Box 00205	09/14/99 12/01/99
205	0000269 MacGregor, Ed Contact: Kyle Hadyn	549-6933 (703) 449-8237	Box 00205	09/14/99 12/01/99
301	0000062 Eaton, Robert Contact: George Eaton	549-8878 (703) 763-5423	Box 00301	09/14/99 12/01/99

Room Assignment Labels (RMLA)

Overview

Use the Room Assignment Labels (RMLA) process to generate room assignment labels. The format for these labels is stored in a communications management forms processing record (ROOM.ASSIGN.LABELS).

You can specify criteria and uses that information with the form layout to select from ROOM.ASSIGNMENT, creating a workfile for fields that must be sorted but are not accessible from those files (such as zip code) and generating labels in the format specified. The RMLA process also sorts and creates a report for postal sorting (if you enter a postal sort code) and selects addresses according to specifications (for example, address hierarchy, mail rules to include or exclude, joint or individual mail). If an activity is specified, it will be updated with the number of pieces and the form ID. If you specify to update history, the mailing history file is updated with the form ID and the date mailed.



Note: This report prints alignment labels.

Sample Form

RMLA-Room Assignment Labels

Form Name **ROMAS.LABELS Room ASSIGNMENT Labels**

Postal Sort Class

Activity to Update

Update Mailing History

Name/Address Selection 

Saved List Name

	Begin	End
Zip	<input type="text"/>	<input type="text"/>
Assignment Date	<input type="text"/>	<input type="text"/>
Terms	<input type="text" value="1"/>	<input type="text"/>
Buildings	<input type="text" value="1"/>	<input type="text"/>
Include Statuses	<input type="text" value="1"/>	<input type="text"/>
Exclude Statuses	<input type="text" value="1"/>	<input type="text"/>
Zips	<input type="text" value="1"/>	<input type="text"/>

Additional Selection Criteria

Sample Report

0000017
145-74-5689
Mr. Jonathan Patton
22 Lincoln Avenue
Bloomington IN 47406

0000329
656-78-7654
Miss Julie Dunnigan
890 Trinidad Avenue
Pella IA 50219

0000621
283-74-4444
Mr. Paul W. Engel
876 Park Street
Fairfax VA 22033

0015650
53-94-1488
Mr. James Goldmann
904 Oakridge Circle
Salt Lake City UT 55920

0015848
008-95-4512
Mr. Joseph Donner
44849 Sparrow Way
Fairfax VA 22033

0016326
560-23-0321
Miss Janice Thompson
4275 Fair Lakes Court
Fairfax VA 22033

0000186
222-93-8711
Miss Cheryl Mohr
56 Sunset Drive
Allentown PA 18938

0000429
138-74-6283
Ms. Marilyn D. Campbell
534 Maple Ave.
Fairfax VA 22033

0000935
174-64-9875
Mr. Kyle Hadyn
88 N. Jordan Avenue
Santa Barbara CA 89342

0015655
538-82-0144
Miss Kathryn Harrison
985 Eden Drive
Atlanta GA 20934

0015849
122-33-4444
Mr. Henry Underwood
999 Eastern Avenue
Silver Spring MD 20912

0016610
467-20-3498
Mr. Fredrick Rose
80 Fee Lane
Reston VA 89232

0000328
555-46-7898
Ms. Julie Thiers
6095 Stoney Hill Road
Herndon VA 20170

0000511
935-56-4810
Mr. Hank Grove
108 Fox Creek Road
Newburgh NY 12550

0001237
172-64-3568
Miss Shirley Barrell
952 Fountain Lane
Herndon VA 20170

0015681
555-44-3333
Mr. Larry Berger
1717 Elm Street
Fairfax VA 22033

0015851
999-33-2123
Ms. Jenifer Parker
8300 Main Street
Alexandria VA 20421

0017539
159-64-7530
Ms. Sara Schrock
201 Summit Manor Court
Apartment 402
Fairfax VA 22033

Res Room Assignment Rpt (RRAS)

Overview

Use the Res Room Assignment Rpt (RRAS) form to run the residence room assignment notices. You can use the form to set up criteria for the report.

The Name/Address Hierarchy field and at least one line of the Contact Information field are required. The Comm Code field is optional, and if entered, is posted automatically to the Communications Management module for each person selected, indicating that this notice was printed. Posting occurs each time the report is run, even if posting gives a person more than one posting of the comm code.

A date range and a term entry have no relationship, unlike many other forms. If you specify a date range, the RRAS report selects all room assignments that occur completely within that date range, regardless of the term (if any) associated to those room assignments. If you specify a term, the RRAS report selects all room assignments with that term on the record, regardless of the dates the room is actually assigned for. You can enter the term in the date fields; this defaults a housing date for the term, but will not set the Term field.

This report only prints notices for room assignments that are not cancelled or terminated, and that have not been previously printed.

Sample Form

RRAS-Residence Room Assignment Rpt

Name/Address Hierarchy

Contact Information

Comm Code/Status/Date

Sort Sequence

Print Room Characteristics

Print Addnl Billing Info

Saved List Name

Begin End

Date

Term

Locations

Buildings

Assignment Statuses

Assignees

Additional Selection Criteria **No**

Sample Report

Jul 13 1999
10:12

RESIDENCE ROOM ASSIGNMENT

Page 1

0002420
Mr. Thomas R. Slater
4579 Chestnut Ave.
San Francisco CA 94121

You have been assigned to the following room(s). If there are any problems or questions regarding your assignment, you should immediately contact:

Room: FLOU 103	Contract.:
01/03/99 - 05/23/99 99/SP	Bldg Type: Res Hall
700 Heritage Drive	Room Type: Double
	Wing.....: West

Roommate	Start Date	End Date	Phone Number
----- Mr. James R. Goldman	01/03/99	05/23/99	(703)673-4402

Residence Room Availability (RRAV)

Overview

Use the Residence Room Availability (RRAV) process to report on room vacancies.

You can specify to run the report double spaced. Running the report single spaced saves paper, but running it double spaced lets you use it as a working document.

You can specify to print information about residents in occupied rooms using the Print resident info field. Resident information includes the following:

- Staff
- G(ender)
- Acad(emic) Program
- Acad(emic) Level
- Class

If you enter "No" in the Print resident info field and enter "No" in the Print vacancies only field, the report prints the name of residents in occupied room, print (VACANCY) for vacant rooms, but does not print resident information.

If you enter "No" in the Print resident info field and enter "Yes" in the Print vacancies only field, the report does not print the name of residents in occupied room nor resident information, but it does print (VACANCY) for vacant rooms.

If you enter "Yes" in the Print resident info field and enter "No" in the Print vacancies only field, the report prints the name of residents in occupied room, the resident information, and prints (VACANCY) for vacant rooms.

Sample Form

RRAV-Residence Room Availability

Double-space

Print resident info

Print vacancies only

Saved List Name

Assignment Dates Begin End

Building Types 1 2

Room Types 1 2

Buildings 1

Wings 1

Floors 1

Additional Selection Criteria No

Sample Report

1999 June 22		RESIDENCE ROOM AVAILABILITY								Page 1
17:37		01/01/99 Through 01/01/00								
Building.....: MET Metropolitan Residence Hall										
Building Type: RD Residence Halls										
Room	Wing	Flr	Room Char	Rm Ty	Cap	Term	St Date	End Date	Assigned To	
101	EA	1	SN	RL	2		01/01/99	01/01/00	(VACANCY) _____	
			CN				01/01/99	01/01/00	(VACANCY) _____	
			CD							
			WE							
102	WE	1	CN	RL	2		01/01/99	01/01/00	(VACANCY) _____	
			SM				01/01/99	01/01/00	(VACANCY) _____	
			FF							
			WW							
							01/01/99	08/27/99	(VACANCY) _____	
							01/01/99	01/01/00	(VACANCY) _____	
201	SO	2	CN	RL	4		01/01/99	01/01/00	(VACANCY) _____	
			SN							
			FM							
			WS							
			FC							
							01/01/99	01/01/00	(VACANCY) _____	
							01/01/99	01/01/00	(VACANCY) _____	
							01/01/99	01/01/00	(VACANCY) _____	
301	EA	3	SM	RL	3		01/01/99	01/01/00	(VACANCY) _____	
			CN							
			WE							
			FM							
			FC							
							01/01/99	01/01/00	(VACANCY) _____	
							01/01/99	01/01/00	(VACANCY) _____	

11 full-period vacancies
0 full assignments

Room Request/Preference Cards (RRPC)

Overview

Use the Room Request/Preference Cards (RRPC) form to generate room request and preference cards. You can generate cards for an individual or several people. You can use saved lists or enter each individual's ID.

Sample Form

RRPC-Room Request/Preference Cards

Form Name: ROOM.REQ

Postal Sort Class: [Dropdown]

Name/Address Sel: [Icon]

Housing Office Address: [1] [2] [3] [4]

Saved List Name: [Text]

Person IDs: [1] [2] [3] [4] [5] [6]

Addnl Sel Criteria: No

Sample Report

07/02/99

RESIDENCE ROOM REQUESTS AND PREFERENCES

0000001

Please indicate below your residence room requests and preferences and return to

I request a residence room for the following time periods:

Term: _____	Term: _____	Term: _____
Start Date: ___/___/___	Start Date: ___/___/___	Start Date: ___/___/___
End Date: ___/___/___	End Date: ___/___/___	End Date: ___/___/___

Same Room as your latest assignment? Yes / No

- - - - - N E W P R E F E R E N C E S - - - - -

Start Date: ___/___/___ End Date: ___/___/___

Building	Reqd?	Room	Reqd?	Wing	Reqd?	Floor	Reqd?
_____	Y / N	_____	Y / N	_____	Y / N	_____	Y / N
_____	Y / N	_____	Y / N	_____	Y / N	_____	Y / N
_____	Y / N	_____	Y / N	_____	Y / N	_____	Y / N

Floor: _____ Reqd?
Y / N

Circle all desired room characteristics and indicate whether required or not.

Non-Smoking	Reqd?	Smoking	Reqd?
Bright; lots of windows	Y / N	No windows at all	Y / N
West window	Y / N	East window	Y / N
Garden view	Y / N	Lake view	Y / N
Alley side	Y / N	Quad side	Y / N
Built-In Desks	Y / N	Braille communication	Y / N
Wheelchair access	Y / N	Handrails installed	Y / N
Wheelchair ramps	Y / N	High ceilings (over 9')	Y / N

Residence Waitlist (RSWT)

Overview

Use the Residence Waitlist (RSWT) process to set selection criteria to run a report of room assignments that are waiting to be made or changed. The default selection sequence is:

- start date
- initial status date
- status
- last, first, middle name

Sample Form

RSWT-Residence Waitlist

Saved List Name

Room Assignment Statuses

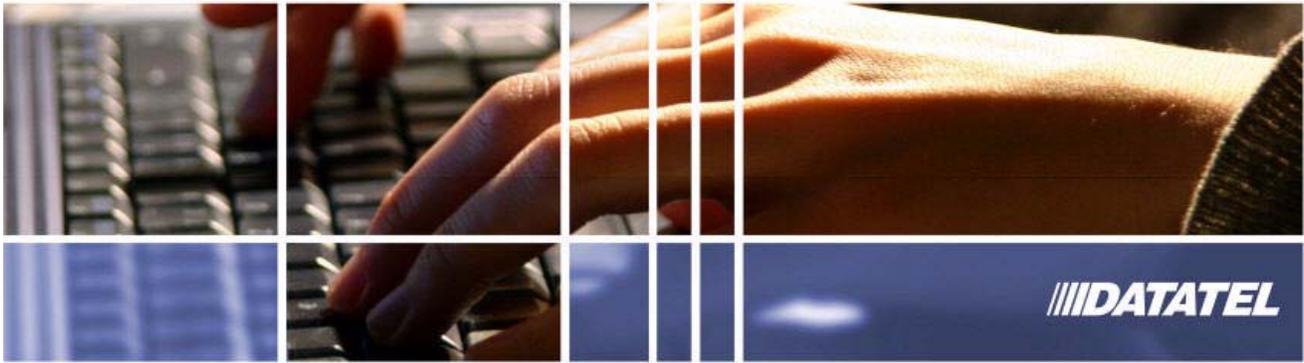
Academic Levels

Classes

Additional Selection Criteria

Sample Report

Jul 13 1999		RESIDENCE WAITLIST										Page 1			
11:50															
ID/ SSN	Name/ Location/ Cur Assignment/Date Acad Program	Level	Class	Request Start/ End Date	Cur Stat	Init Stat Date	Floor	Bldg	Wing	Room	Floor	Room Char	Rmrate Char	Rmrate	
0001051 327-36-6241	Ms. Betty L. Parker Main Campus (No current assignment) BA-HIST UG Freshman BS-COMP			02/07/99 WL 06/01/99		10/31/99		MET		101 (V)					
0000499 403-92-8374	Regina M. Gonzalez Downtown Campus (No current assignment) BS-COMP UG Freshman			10/14/98 WL 12/12/99		10/31/99		YATE YATE		100 (V) 200 (V)				0001342	
0000244 222-22-2222	Ms. Marjorie Cooke (No current assignment) BS-COMP UG Freshman			03/23/99 WL 06/01/99		10/31/99		WEBB		105 (V)					
0000802 342-83-7384	Lisa C. Ward Downtown Campus (No current assignment) BS-COMP UG Freshman			10/14/98 WL 12/12/99		10/31/99		YATE YATE		200 (V) 100 (V)					
0001811 337-99-2283	Mr. Thomas M. Northern (No current assignment) BS-BFIN UG			01/04/99 R 05/20/99		03/02/99									



Student System Sample Reports

SuccessDashboards

Student Analytics

Overview

The Student Success Dashboards deal with specific area of knowledge and include data gathered from an Operational Data Store (ODS). Ease of access, usability, as well as fast processing of the data, are some of the characteristics of dashboards. Dashboards are easy to use because they are convenient and can be accessed from virtually anywhere.

[Table 1](#) lists and describes each of the dashboards in brief.

Table 1: The Student Success Dashboards

Dashboard Name	Description
Director of Admissions	Illustrates the admissions process by allowing the Director of Admissions to see the information about prospect inquiries, applications, and enrollment.
VP of Enrollment Management	Illustrates the effectiveness of student recruitment, admissions, retention services, and registrar services. The dashboard includes information about enrollment, applications, and retention which helps to determine if the goals for enrollment, retention, and admissions have been met.
Registrar	Illustrates the effectiveness of the Office of the Registrar to handle registration, class schedules, and retention strategies. The dashboard includes information about current enrollment, available seats, courses with waitlists, and students on probation.
Director of Residence Life	Illustrates the ability of the Residence Life Office to meet the housing needs of the students. The dashboard includes information about occupancy rates, housing requests, availability, and waitlists.

Dashboard Components

Each dashboard is made up of a series of analytics and Web Intelligence Documents (WebIS), often with the same analytics or WebIS being used on multiple dashboards.

Table 2 lists the analytics and WebIs used on the Student SuccessDashboard.

Table 2: Dashboard Analytics and Web Intelligence Documents

Analytic Name	Source Files	Measures	Filters	Dashboard
Accepted Applications for Upcoming Term	ODS_APPLICATIONS APPLICATION_REP SPT_PERSON_NON_CORP APPLICANT_HIGH_SCHOOL_INFO	Application Start Term Admitted From State Desc Application Admissions Rep Name Application Academic Program Title Person Gender Person Ethnic Desc Application Count Current Prospect Status Desc Applicant Graduating High School Name Applicant Graduating High School GPA Band Applicant SAT Verbal Score Applicant SAT Math Score	Is Accepted	VP of Enrollment Management Director of Admissions
Accepted Applications For Upcoming Term Analysis	ODS_APPLICATIONS APPLICANT_HIGH_SCHOOL_INFO APPLICATION_REP SPT_PERSON_NON_CORP	Application Start Term Admitted From State Desc Application Admissions Rep Name Application Academic Program Title Person Gender Person Ethnic Desc Applicant Graduating High School Name Applicant Graduating High School GPA Band Application Count Application Current Status Desc Applicant SAT Verbal Score Bands Applicant SAT Math Score Bands Application Admit Status Desc	Is Accepted	VP of Enrollment Management Director of Admissions

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Accepted Applications Top 5 Acad Programs	ODS_APPLICATIONS APPLICATION_REP SPT_PERSON_NON_CORP APPLICANT_HIGH_SCHOOL_INFO	Application Start Term Admitted From State Desc Application Admissions Rep Name Application Academic Program Title Person Gender Person Ethnic Desc Application Count Applicant SAT Verbal Score Applicant SAT Math Score Current Prospect Status Desc Applicant Graduating High School Name Applicant Graduating High School GPA Band Applicant SAT Math Score Bands Applicant SAT Verbal Score Bands Application Admit Status Desc	Is Accepted	VP of Enrollment Management Director of Admissions
Admissions Funnel Report	ODS_APPLICATIONS SPT_PERSON_NON_CORP	Funnel Report Label - Prospects Application Source Desc Person Origin Code Desc Application Count Funnel Report Label - Applied Funnel Report Label - Matriculated Funnel Report Label - Accepted	Is Prospect Applications For Next Term Has Applied Is Accepted Has Matriculated	VP of Enrollment Management Director of Admissions
Available Spaces Analysis	ODS_ROOMS	Room Building Description Room Wing Description Room Floor Number Room Capacity Sum Room Assignment Count	Residential Room Active Room Assignments	Director of Residence Life
Available Spaces Report	ODS_ROOMS	Room Building Description Room Wing Description Room Floor Number Room Capacity Sum Room Assignment Count	Residential Room Active Room Assignments	Director of Residence Life

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Course Section Waitlist	ODS_COURSE_SECTIONS ODS_WAIT_LIST	Waitlisted Seats Label Section ID Section Course Section Name Section Number Section Subject Desc Section Term Section Title Section Department 1 Desc Section Division 1 Desc Section School 1 Desc Wait List Student Count Section Capacity Section Active Student Count	Section Term Is Not Null	VP of Enrollment Management Registrar
Course Section Waitlist Analysis	ODS_COURSE_SECTIONS ODS_WAIT_LIST	Section ID Section Course Section Name Section Number Section Subject Desc Section Term Section Title Section Department 1 Desc Section Division 1 Desc Section School 1 Desc Wait List Student Count Section Capacity Section Academic Level Desc Section Location Desc Section Building Section Instructional Methods Section Weekly Meetings Start Time Band Section Active Student Count	Section Term Equal to Current Term	VP of Enrollment Management Registrar

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Current Enrollment	ODS_STUDENTS STUDENT_UNIQUE_ACAD_INFO STUDENT_TERM_UNIQUE SPT_PERSON_NON_CORP	Preferred Acad Level Term Id Person Residence State Desc Person Age Person Age Band Person Gender Student Count	Term ID Equal to Current Term or Term One Year Ago	VP of Enrollment Management Registrar
Current Enrollment Analysis	SPT_PERSON_NON_CORP STUDENT_UNIQUE_ACAD_INFO ODS_STUDENTS STUDENT_TERM_UNIQUE	Preferred Acad Level Term Id Person Residence State Desc Student Residency Status Desc Class Level Desc Person Age Person Age Band Acad Level Cum GPA Band Person Gender Student Count Student Program Title Student ID	Term Id Equal to Current Term	VP of Enrollment Management Registrar
Current Total Enrollment	ODS_STUDENTS	Student Count	Current Student Term	VP of Enrollment Management Registrar
Freshman Apps for Next Term	ODS_APPLICATIONS	Application Count	Applications for Next Term Freshman Applications	Director of Admissions
Housing Occupancy Analysis	ODS_ROOMS ODS_ROOM_ASSIGNMENTS	Room Building Description Room Wing Description Room Floor Number Room Capacity Sum Room Assignment Count	Residential Room Active Room Assignments	Director of Residence Life
Housing Occupancy Report	ODS_ROOMS ODS_ROOM_ASSIGNMENTS	Room Building Description Room Wing Description Room Floor Number Room Capacity Sum Room Assignment Count	Residential Room Active Room Assignments	Director of Residence Life

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Housing Request Analysis	ODS_ROOM_ASSIGNMENTS ODS_ROOMS STUDENT_UNIQUE_ACAD_INFO SPT_PERSON_NON_CORP	Room Assignment Count Student Preferred Acad Level Current Assignment Status Desc Room Building Description Room Type Description Room Wing Description Room Floor Number Room Assignment Wait List Flag Person Preferred Name	Current Assignments Residential Room	Director of Residence Life
Housing Requests	ODS_ROOM_ASSIGNMENTS ODS_ROOMS STUDENT_UNIQUE_ACAD_INFO	Room Assignment Count Student Preferred Acad Level Current Assignment Status Desc Assigned Building Room Building Description	Current Assignments Residential Room	Director of Residence Life
Institutional Cohort Retention Measure Analysis	ODS_STUDENTS SPT_PERSON_NON_CORP STUDENT_UNIQUE_ACAD_INFO	Student Count Student Residency Status Desc Preferred Acad Level Person Age Band Person Gender Person Residence State Desc Acad Level Cum GPA Band Preferred Acad Level Class Desc	Term Id Equal to Cohort Retention Start Term	VP of Enrollment Management Registrar
Institutional Cohort Retention Measure Bar	ODS_STUDENTS SPT_PERSON_NON_CORP STUDENT_UNIQUE_ACAD_INFO	Student Count Student Residency Status Desc Preferred Acad Level Person Age Band Person Gender Person Residence State Desc Acad Level Cum GPA Band	Term Id Equal to Cohort Retention Start Term	VP of Enrollment Management Registrar
Institutional Cohort Retention Measure Pie	ODS_STUDENTS	Retained Students Label Student Count Not Retained Students Label	Term Id Equal to Cohort Retention Start Term	VP of Enrollment Management Registrar

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
New Students Persisting to the Next Term	ODS_STUDENTS SPT_PERSON_NON_CORP STUDENT_UNIQUE_ACAD_INFO	Student Count Student Residency Status Desc Preferred Acad Level Person Age Band Person Gender Person Residence State Desc Acad Level Cum Band	Term Id Equal to Previous Term	VP of Enrollment Management Registrar
New Students Persisting to the Next Term Analysis	ODS_STUDENTS SPT_PERSON_NON_CORP STUDENT_UNIQUE_ACAD_INFO	Student Count Student Residency Status Desc Preferred Acad Level Person Age Band Person Gender Person Residence State Desc Acad Level Cum Band Preferred Acad Level Class Desc	Term Id Equal to Previous Term	VP of Enrollment Management Registrar
New Students with Paid Enrollment Deposits	ODS_APPLICATIONS	Next Application Term Applicant Count	Paid Deposit Is Accepted New Student Application Applications For Next Term	VP of Enrollment Management Director of Admissions Registrar
New Students with Paid Enrollment Deposits Analysis	SPT_PERSON_NON_CORP ODS_APPLICATIONS ODS_APPLICANTS APPLICATION_REP STUDENT_DEPOSITS_FOR_TERM APPLICANT_HIGH_SCHOOL_INFO	Application ID Application Start Term Applicant ID Applicant Deposit Amount Application Admissions Rep Name Admitted From State Desc Application Source Desc Application Academic Program Title Person Ethnic Desc Person Gender Applicant Graduating High School Name Applicant Graduating High School GPA Band Applicant SAT Verbal Score Bands Applicant SAT Math Score Bands Person Age Band Application Admit Status Desc	Paid Deposit Is Accepted New Student Application Applications For Next Term	VP of Enrollment Management Director of Admissions

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
New Students with Paid Enrollment Deposits for Upcoming	SPT_PERSON_NON_CORP ODS_APPLICATIONS ODS_APPLICANTS APPLICATION_REP STUDENT_DEPOSITS_FOR_TERM	Application ID Application Start Term Applicant ID Applicant Deposit Amount Application Admissions Rep Name Admitted From State Desc Application Academic Program Title Person Ethnic Desc Person Gender Application Admit Status Desc	Paid Deposit Is Accepted New Student Application Applications For Next Term	VP of Enrollment Management Director of Admissions
Number of Resident Students	ODS_STUDENTS STUDENT_UNIQUE_ACAD_INFO ODS_ROOM_ASSIGNMENTS	Student ID Student Preferred Acad Level Preferred Acad Level Class Desc Room Assignment Count	Residential Room Active Room Assignments	Director of Residence Life
Occupancy	ODS_ROOMS	Vacant Label Room Capacity Sum Occupied Label Room Assignment Count	Residential Room Not Waitlisted Active Room Assignments	Director of Residence Life
Percentage of Available Seats	ODS_COURSE_SECTIONS	Available Seats Label Available Seats Section Capacity Taken Seats Label Section Active Student Count	Section Term Equal to Current Term Defined Capacity	VP of Enrollment Management Registrar
Percentage of Sections with Waitlists	ODS_COURSE_SECTIONS	Sections With Waitlists Label Section ID	Section Term Equal to Current Term	VP of Enrollment Management Registrar

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Prospect Inquiries Analysis	ODS_APPLICATIONS ODS_APPLICANTS APPLICANT_HIGH_SCHOOL_I NFO SPT_PERSON_NON_CORP APPLICATION_REP	Application Start Term Person Gender Admitted From State Desc Person Origin Code Desc Applicant Graduating High School GPA Band Applicant Graduating High School Name Person Preferred Name Applicant ID Application ID Applicant SAT Math Score Bands Applicant SAT Verbal Score Bands Applicant Admissions Rep Name Application Academic Program Title	Freshman Applications	Director of Admissions
Prospect Inquiries Report	ODS_APPLICATIONS SPT_PERSON_NON_CORP	Chart Measure Application Start Term Measure Values Application Count Applicant Gender Person Gender Person Origin Code Desc Admitted From State Desc Applicant High School GPA Band Prospect Source Application State	Applications For Next Term Applications For Previous Term Freshman Applications	Director of Admissions
Term Probation Analysis	ODS_STUDENT_TERMS ODS_STUDENTS	Student ID Student Term Academic Level Desc Student Term ID Preferred Acad Level GPA Range Student Residency Status Desc Student Term Load Desc IPEDS Race/Ethnic Description Student Preferred Acad Level Person Age Band Preferred Acad Level Class Desc	Student Probation Current Student Term	VP of Enrollment Management Registrar

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Term Probation Bar	ODS_STUDENT_TERMS ODS_STUDENTS	Student ID Student Term Academic Level Desc Student Term ID	Student Probation Current Student Term	VP of Enrollment Management Registrar
Term Probation Pie	ODS_STUDENT_PROGRAMS SPT_PERSON_NON_CORP	Student Academic Level Standing Desc Student Academic Level Standing Student Program Title Program Academic Level Person ID Program Department Desc Program Division Desc Program School Desc Student Program Location Desc Person Age Band Person Gender	Current Student Term	VP of Enrollment Management Registrar
Total Applications for Next Term	ODS_APPLICATIONS	Application ID Application Current Status Desc	Applications For Next Term	Director of Admissions
Total Housing Waitlist	ODS_ROOM_ASSIGNMENTS STUDENT_UNIQUE_ACAD_INFO	Student Preferred Acad Level Room Assignment Count	Waitlisted Assignment Current Assignments	Director of Residence Life
Total Housing Waitlist Analysis	ODS_ROOM_ASSIGNMENTS STUDENT_UNIQUE_ACAD_INFO	Room Assignment Count Student Preferred Acad Level Person Preferred Name Student Residency Status Desc Student Current Home Location	Waitlisted Assignment Active Room Assignments	Director of Residence Life
Total Housing Waitlist Bar	SPT_STUDENT_ACAD_LEVELS ODS_ROOM_ASSIGNMENTS	Room Assignment Count Student Preferred Acad Level Preferred Acad Level GPA Range Student Current Location Desc Student Type Desc Student Residency Status Desc	Waitlisted Assignment Active Room Assignments	Director of Residence Life
Total Housing Waitlist Pie	ODS_ROOM_ASSIGNMENTS	Room Assignment Count Assigned Building Assigned Room ID	Active Room Assignments	Director of Residence Life

Table 2: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Total Prospects for Next Term	ODS_APPLICATIONS	Application Count Next Application Term	Is Prospect Applications For Next Term	Director of Admissions
Total Prospects for Next Term vs Last Year	ODS_APPLICATIONS SPT_PERSON_NON_CORP	Chart Measure Application Start Term Measure Value Application Count Applicant Gender Person Gender Person Origin Code Desc Application State Admitted From State Desc Prospect Source	Freshman Applications Applications For Next Term Applications For Previous Term	
Transfer Apps for Next Term	ODS_APPLICATIONS	Application Count Next Application Term	Applications For Next Term Transfer Applications	Director of Admissions

VP of Enrollment Management Dashboard

Overview

The VP of Enrollment Management dashboard illustrates the effectiveness of student recruitment, admissions, retention services, and registrar services. The dashboard includes information about enrollment, applications, and retention which helps to determine if the goals for enrollment, retention, and admissions have been met. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting admissions, retention, and course section information. This includes a graph for current total enrollment, institutional cohort retention, and percentage of available seats.
- **Applications.** Displays graphs detailing information about applications for the upcoming term. This includes a graph for accepted applications, admissions funnel report, and accepted applications in the top five academic programs. Also included are two sub-tabs where you can do analysis on the accepted application information and the new students.
- **Enrollment.** Displays graphs detailing information about the current enrollment. This includes a graph for current enrollment by academic level and course section waitlist information. Also included are two sub-tabs where you can do analysis on the current enrollment information and the course section waitlist information.
- **Retention & Standing.** Displays graphs detailing information about the academic standing of students. This includes a graph for students currently on probation and new students persisting to the next term. Also included are three sub-tabs where you can do analysis on probation information, persisting student information, and institutional cohort retention information.

Sample Dashboard

Figure 1: Examples of the VP of Enrollment Management Dashboard



Dashboard Components

Table 3 lists the components of the VP of Enrollment Management dashboard.

Table 3: Dashboard Components Used with the VP of Enrollment Management View

Tab	Item
Main	Current Total Enrollment
	New Students with Paid Enrollment Deposits
	Institutional Cohort Retention Measure Pie
	Term Probation Pie
	Percentage of Sections with Waitlists
	Percentage of Available Seats
Applications	Accepted Applications for Upcoming Term
	Admissions Funnel Report
	New Students with Paid Enrollment Deposits for Upcoming
	Accepted Applications - Top 5 Acad Programs
	Accepted Applications for Upcoming Term Analysis
	New Students with Paid Enrollment Deposits Analysis
Enrollment	Current Enrollment
	Course Section Waitlist
	Current Enrollment Analysis
	Course Section Waitlist Analysis
Retention & Standing	Term Probation Bar
	New Students Persisting to the Next Term
	Institutional Cohort Retention Measure Bar
	Term Probation Analysis
	New Students Persisting to the Next Term Analysis
	Institutional Cohort Retention Measure Analysis

Director of Admissions Dashboard

Overview

The FA Director dashboard illustrates the admissions funnel process by allowing the Director of Admissions to see the information about prospect inquiries, applications, and enrollment. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting information about prospects, students, and transfer students. This includes a graph for total new students, total transfer students, and prospect inquiries.
- **Prospects.** Displays a graph detailing the prospect inquiries that have been received.
- **Applications.** Displays graphs detailing information about the applications for the upcoming term. This includes a graph for the accepted applications and the number of accepted applications in the top five academic programs. Also included are two sub-tabs where you can do analysis on the accepted applications and new student information.
- **Admissions Funnel.** Displays a graph that details each part of the admissions funnel.

Sample Dashboard

Figure 2: Examples of the Director of Admissions Dashboard



Dashboard Components

Table 4 lists the components of the Director of Admissions dashboard./.

Table 4: Dashboard Components Used with the Director of Admissions View

Tab	Item
Main	Total Prospect Inquiries for Next Term
	Freshman Apps for Next Term
	Transfer Apps for Next Term
	Total Applications for Next Term
	New Students with Paid Enrollment Deposits
Prospects	Prospect Inquiries Analysis
Applications	Accepted Applications for Upcoming Term
	New Students with Paid Enrollment Deposits for Upcoming
	Accepted Applications - Top 5 Acad Programs
	Accepted Applications For Upcoming Term Analysis
	New Students with Paid Enrollment Deposits Analysis
Admissions Funnel	Admissions Funnel Report

Director of Residence Life Dashboard

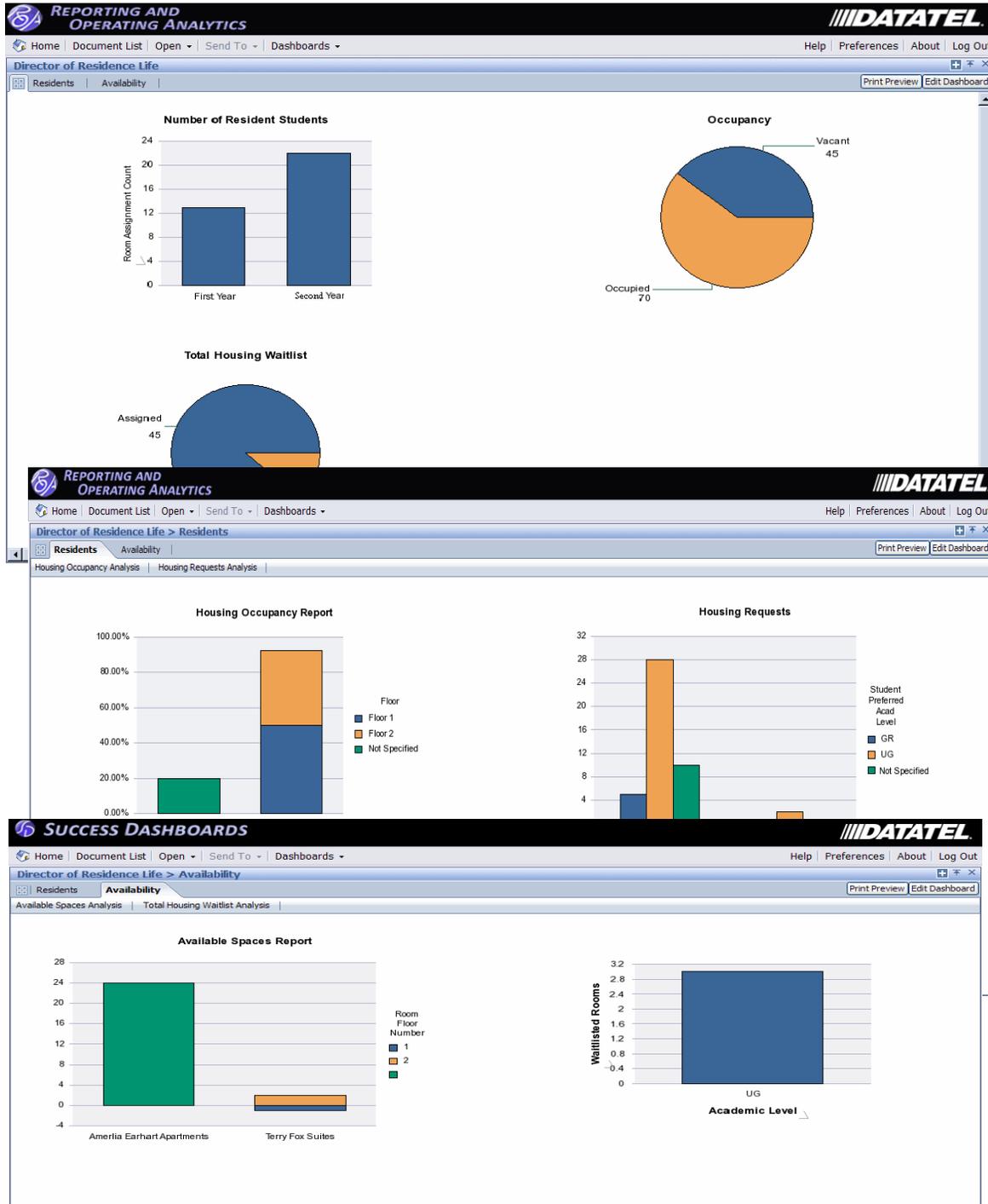
Overview

The Director of Residence Life dashboard illustrates the effectiveness of the Residence Life Office to meet the housing needs of the students. The dashboard includes information about occupancy rates, housing requests, availability, and waitlists. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting occupancy and housing information.
- **Residents.** Displays graphs detailing information about housing. This includes a graph for housing occupancy and housing requests. Also included are two sub-tabs where you can do analysis on the housing occupancy rates and housing requests.
- **Availability.** Displays graphs detailing information about the available spaces and housing waitlist. Also included are two sub-tabs where you can do analysis on the available housing and the housing waitlist.

Sample Dashboard

Figure 3: Examples of the Director of Residence Life Dashboard



Dashboard Components

Table 5 lists the components of the Director of Residence Life dashboard.

Table 5: Dashboard Components Used with the Director of Residence Life View

Tab	Item
Main	Number of Resident Students
	Occupancy
	Total Housing Waitlist Pie
Residents	Housing Occupancy Report
	Housing Requests
	Housing Occupancy Analysis
	Housing Request Analysis
Availability	Available Spaces Report
	Total Housing Waitlist Bar
	Available Spaces Analysis
	Total Housing Waitlist Analysis

Registrar Dashboard

Overview

The Registrar dashboard illustrates the effectiveness of the Office of the Registrar to handle registration, class schedules, and retention strategies. The dashboard includes information about current enrollment, available seats, courses with waitlists, and students on probation. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting enrollment, course section information, and retention information. This includes a graph for total enrollment, institutional cohort retention measure, percentage of section with waitlists, and percentage of available seats.
- **Enrollment.** Displays graphs detailing information about current enrollment a course section waitlists. Also included are two sub-tabs where you can do analysis on the current enrollment information and the course section waitlist information.
- **Retention & Standing.** Displays graphs detailing information about the academic standing of students. This includes a graph for students currently on probation and new students persisting to the next term. Also included are three sub-tabs where you can do analysis on probation information, persisting student information, and institutional cohort retention information.

Sample Dashboard

Figure 4: Examples of the Registrar Dashboard



Dashboard Components

Table 6 lists the components of the Registrar dashboard.

Table 6: Dashboard Components Used with the Registrar View

Tab	Item
Main	Current Total Enrollment
	New Students with Paid Enrollment Deposits
	Institutional Cohort Retention Measure Pie
	Term Probation Pie
	Percentage of Sections with Waitlists
	Percentage of Available Seats
Enrollment	Current Enrollment
	Course Section Waitlist
	Current Total Enrollment Analysis
	Course Section Waitlist Analysis
Retention & Standing	Term Probation Bar
	New Students Persisting to the Next Term
	Institutional Cohort Retention Measure Bar
	Term Probation Analysis
	New Students Persisting to the Next Term Analysis
	Institutional Cohort Retention Measure Analysis

Financial Aid Analytics

Overview

The Financial Aid SuccessDashboards deal with specific area of knowledge and include data gathered from an Operational Data Store (ODS). Ease of access, usability, as well as fast processing of the data, are some of the characteristics of dashboards. Dashboards are easy to use because they are convenient and can be accessed from virtually anywhere.

[Table 7](#) lists and describes each of the dashboards in brief.

Table 7: The Financial Aid SuccessDashboards

Dashboard Name	Description
FA Director	Illustrates how many students are receiving financial aid and how much financial aid has been awarded. This dashboard includes information about awards by category and type. Information about ISIRs is also included on the dashboard for the Financial Aid Director.
Assistant FA Director	Illustrates the information your institution has about ISIRs, including how many ISIRs have been received and by their type. The dashboard includes analysis of the ISIR data, including the number of ISIRs selected for verification. Also included on the dashboard is information about students satisfactory academic progress (SAP).
FA Loan Specialist	Illustrates how many students are receiving loans, the types of loans, and loans awaiting certification. This dashboards includes the ability to view detailed information about loans and allows you to manipulate the data to view the exact measures you need to track your Direct and CommonLine loan information.

Dashboard Components

Each dashboard is made up of a series of analytics and Web Intelligence Documents (WebIS), often with the same analytics or WebIS being used on multiple dashboards.

Table 8 lists the analytics and WebIs used on the Financial Aid SuccessDashboard.

Table 8: Dashboard Analytics and Web Intelligence Documents

Analytic Name	Source Files	Measures	Filters	Dashboard
Awards by Award Type	ODS_FA_TERM_AWARDS	Award Type Desc Award Term Amount Award Category Desc Award ID Award Description Award Category Id	Current Academic Year FA Awarded	FA Director Assistant FA Director
Breakdown of Loans w/o Interview CommonLine	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR	Loan Award Amount Loan Award Category Id Loan Academic Year Loan Award Category Desc	Loan Interview Date Equals "null" Current Academic Year for Student Loan CommonLine Loan Loan Awarded	FA Loan Specialist
Breakdown of Loans w/o Interview Direct	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR	Loan Award Amount Loan Award Category Id Loan Academic Year Loan Award Category Desc	Loan Interview Date Equals "null" Current Academic Year for Student Loan Direct Loan Loan Awarded	FA Loan Specialist

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
CommonLine Loans Analysis Report	ODS_FA_TERM_AWARDS ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR ODS_PERSON	Award Category Desc Loan Type Code Loan Type Desc Award Action Category Desc Loan Academic Year Award Recipient Student Id Loan Certification Complete Indicator Loan Lender ID Loan Lender Preferred Name Preferred Name Student ID Loan Interview Complete Indicator Award Term Amount Award Action Desc Award ID Award Description Award AR Transmittal Amt	CommonLine Loan	FA Loan Specialist
CPS Selected IRISs for Verification per FA Counselor	ODS_ISIR_FAFSA ODS_STUDENT_FA_INFO	FA Current Counselor Name FA Info Academic Year ISIR Student Verification Selection Status FA Student File Completed Status ISIR ID FA Verification Status for FA Year FA Verification Status Desc	FA Info Academic Year Equal to Current Academic Year Current IFAF Year	FA Director

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Direct Loans Analysis Report	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR ODS_FA_TERM_AWARDS ODS_STUDENTS ODS_PERSON	Award Category Desc Loan Type Code Loan Type Desc Award Action Category Desc Loan Academic Year Award Recipient Student Id Loan Lender ID Preferred Name Loan Interview Complete Indicator Award Term Amount Award Action Desc Award ID Award Description Direct Loan Award Begin Date Direct Loan Award End Date Direct Loan Award Id Direct Loan Award Recipient Name Direct Loan Award MPN Status Direct Loan Award Response Indicator Direct Loan Award Year Direct Loan Booked Date Direct Loan Credit Decision Date Direct Loan Credit Decision Status Direct Loan Grade Level Direct Loan ID Direct Loan Interest Rebate Pct Direct Loan Origination Fee Pct FA Student ID Award Ar Transmittal Amt	Direct Loan	FA Loan Specialist
Direct Loans Awarded	TA_AWARDS_BY_ACAD_YEAR	Loan MPN on File Indicator Loan Award Amount	Direct Loan Loan Awarded Current Academic Year for Student Loan	FA Loan Specialist
Enrolled Students FA	ODS_FA_TERM_AWARDS ODS_STUDENT_TERMS	Award Recipient Student Id Student Terms Student	Current Academic Year FA Awarded Active Term Enrollment	FA Director

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
FA Award Average	ODS_FA_TERM_AWARDS	Award Term Amount Award Category Desc Award Period Start Date Award Academic Level Award Recipient Student Id Award Academic Year	Current Academic Year FA Awarded	FA Director
FA Award by Category	ODS_FA_TERM_AWARDS	Award Term Amount Award Category Desc Award Period Start Date Award Academic Level Award Recipient Student Id Award Academic Year	Current Academic Year FA Awarded	FA Director
FA Awarded by Year	ODS_FA_TERM_AWARDS	Award Term Amount Award Academic Year Award Recipient Student Id Awarded AR Transmittal Amt Award Status Description	Current Academic Year and Previous Year FA Awarded	FA Director
Federal Awards	ODS_FA_TERM_AWARDS	Award Term Amount Award Type Award Category Id Award Category Desc	Current Academic Year Award Type Equals "F" FA Awarded	FA Director
Institutional Awards	ODS_FA_TERM_AWARDS	Award Term Amount Award Type Award Category Id Award Category Desc	Current Academic Year Award Type Equals "I" FA Awarded	FA Director
ISIR Corrections	ODS_ISIR_FAFSA	ISIR Correction Status Desc ISIR ID ISIR Correction Id ISIR Correction Status ISIR Correction Sent Date	Current IFAF Import Year ISIR Correction Id Is Not "null"	Assistant FA Director

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
ISIRs Received by Date	ODS_ISIR_FAFSA	ISIR Import Year ISIR ID ISIR Student ID ISIR Receipt Date ISIR Receipt Date - YTD Label	ISIR Import Year Equals Current FA Year and Previous FA Year ISIR Receipt Date Is Less Than or Equal to Current Date and Date One Year Ago	FA Director Assistant FA Director
ISIRs Selected For Verification by CPS	ODS_ISIR_FAFSA	ISIR ID ISIR Student Verification Selection Status	Current IFAF Year	FA Director Assistant FA Director
Loan Types Awaiting Certification	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR	Loan Award Category Id Loan Award Amount Loan Award Category Desc Loan Record ID	Loan Awarded CommonLine Loan Current Academic Year for Student Loan Loan Commonline Application ID Is Not "null" Loan Certification Complete Indicator Equals "N"	FA Loan Specialist
Loan Types Awaiting Origination	ODS_STUDENT_LOANS	Loan Academic Year Loan Award Category Desc Loan Award Category Id Loan Award Amount	Direct Loan Current Academic Year for Student Loan Direct Loan Awaiting Certification Loan Awarded	FA Loan Specialist
Loan Types Originated	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR	Loan Award Category Id Loan Award Amount Loan Award Category Desc Loan Record ID	Direct Loan Current Academic Year for Student Loan Direct Loan Originated	FA Loan Specialist

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Loans Disbursed Analysis	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR ODS_FA_TERM_AWARDS	Award AR Transmittal Amt Award Term Amount Loan Type Code Loan Type Desc Award Action Category Desc Award Recipient Student Id Award ID Award Period ID Award Academic Year Award Status Description Award Action Category	CommonLine Loan	FA Loan Specialist

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Loans Disbursed Analysis - Direct	ODS_STUDENT_LOANS TA_AWARDS_BY_ACAD_YEAR ODS_FA_TERM_AWARDS	Award AR Transmittal Amt Award Term Amount Award Recipient Student Id Loan Type Desc Loan Type Code Award ID Award Period ID Award Academic Year Award Status Description Award Action Category Award Action Category Desc Loan Disbursement Amount - Distinct Direct Loan Booked Amount - Distinct Direct Loan Award Amount - Distinct Direct Loan Award Begin Date Direct Loan Award End Date Direct Loan Award Id Direct Loan Award Recipient Name Direct Loan Award MPN Status Direct Loan Award Response Indicator Direct Loan Award Year Direct Loan Booked Date Direct Loan Credit Decision Date Direct Loan Credit Decision Status Direct Loan Grade Level Direct Loan ID Direct Loan Interest Rebate Pct Direct Loan Origination Fee Pct	Direct Loan	FA Loan Specialist
Loan Sent Awaiting Certification	ODS_STUDENT_LOAN	Loan Certification Complete Indicator Number of Loan Awards	Current Academic Year for Student Loan Loan CommonLine Application ID Is Not Equal to "null"	FA Loan Specialist

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Other Awards	ODS_FA_TERM_AWARDS	Award Term Amount Award Type Award Category Id Award Category Desc	Current Academic Year FA Awarded Award Type Equals "O" FA Awarded	FA Director
Pell-Eligible Students	ODS_ISIR_FAFSA	ISIR Pell Grant Eligibility Flag ISIR ID ISIR Student ID	Current IFAF Import Year	FA Director
Percent of Loans With Entrance Interviews	ODS_FA_STUDENT_INTERVIEWS ODS_STUDENT_LOANS	Number of Loan Awards Loan Interview Complete Indicator	Loan Awarded Current Academic Year for Student Loan	FA Loan Specialist
State Awards	ODS_FA_TERM_AWARDS	Award Term Amount Award Type Award Category Id Award Category Desc	Current Academic Year FA Awarded Award Type Equals "S"	FA Director
Student Academic Progress for Current Term	ODS_STUDENT_FA_INFO	FA Calculated SAP Status Desc FA Latest SAP Evaluation Period Start Date FA Latest SAL Evaluation Period End Date FA Latest SAP Evaluation Period Start Term FA Latest SAP Evaluation Period End Term FA Student ID FA Info Academic Year	Current Academic Year for Student FA Info SAP End Period in Current Term	Assistant FA Director
Student Academic Progress for Current Year	ODS_STUDENT_FA_INFO	FA Calculated SAP Status Desc FA Latest SAP Evaluation Period Start Date FA Latest SAL Evaluation Period End Date FA Latest SAP Evaluation Period Start Term FA Latest SAP Evaluation Period End Term FA Student ID FA Info Academic Year	Current Academic Year for Student FA Info SAP End Period in Academic Year	Assistant FA Director
Student Documentation Status	ODS_STUDENT_FA_INFO	FA Student FA File Complete Date FA Info Academic Year FA Student ID	Current Academic Year for Student FA Info	FA Director

Table 8: Dashboard Analytics and Web Intelligence Documents (cont'd)

Analytic Name	Source Files	Measures	Filters	Dashboard
Total ISIRs	ODS_ISIR_FAFSA	ISIR ID ISIR Student Verification Selection Status ISIR Pell Grant Eligibility Flag ISIR Import Year ISIR Student ID	ISIR Import Year Greater Than or Equal to Starting Year for ISIR History	FA Director Assistant FA Director
Total Loans Awarded	ODS_FA_TERM_AWARDS ODS_STUDENT_LOANS	Loan Academic Year Award Term Amount Award Category Desc Award Category Id	FA Awarded Current Academic Year	FA Loan Specialist
Total Loans Disbursed	ODS_STUDENT_LOANS	Loan Academic Year Loan Award Category Desc Loan Award Category Id Loan Award Amount Loan Disbursement Amount - Distinct	Loan Awarded Current Academic Year for Student Loan	FA Loan Specialist
Total Loans Disbursed Direct	ODS_STUDENT_LOANS	Loan Academic Year Loan Award Category Desc Loan Award Category Id Loan Award Amount Loan Disbursement Amount - Distinct	Loan Awarded Direct Loan Current Academic Year for Student Loan	FA Loan Specialist

FA Director Dashboard

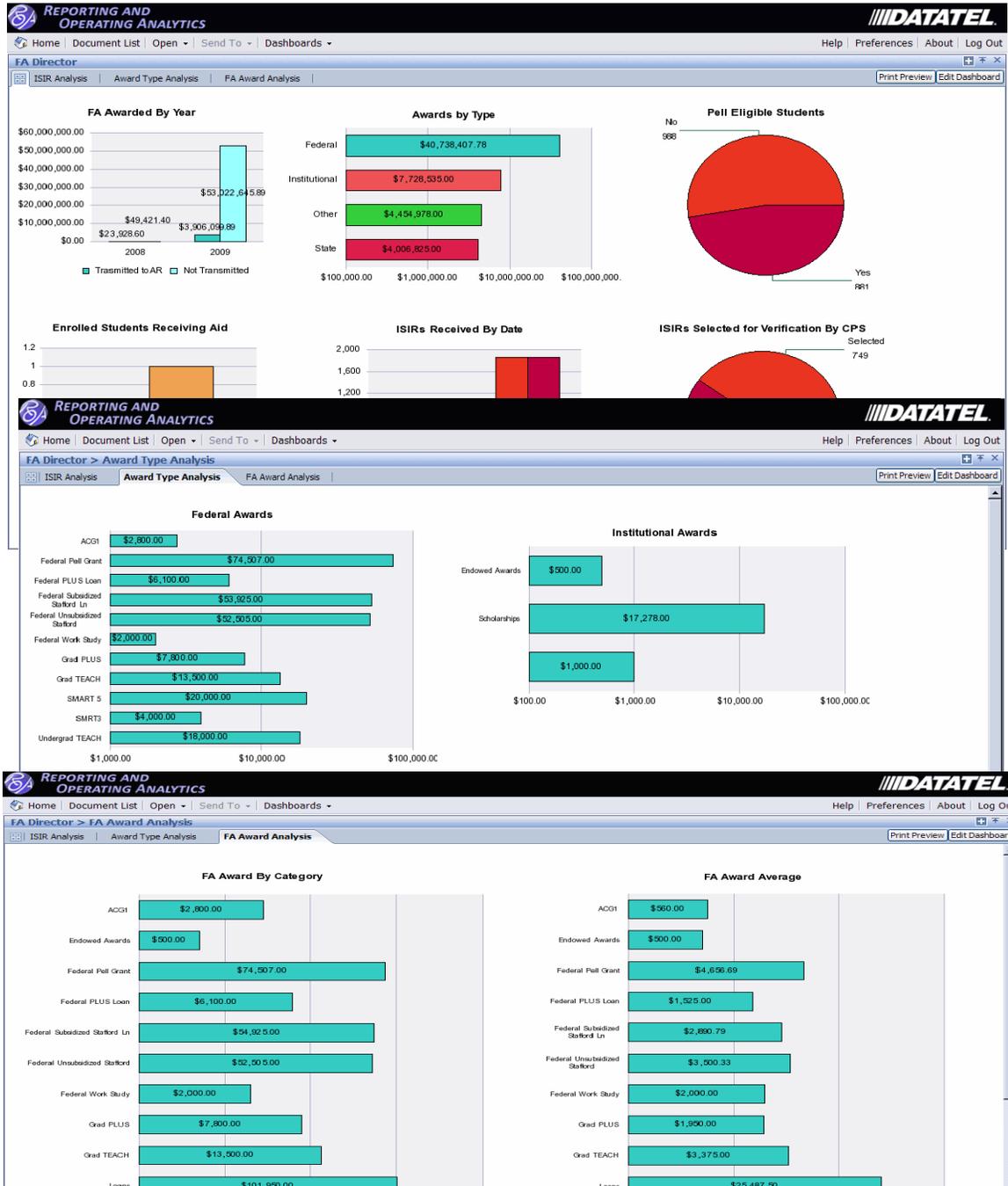
Overview

The FA Director dashboard illustrates how many students are receiving financial aid and how much financial aid has been awarded. This dashboard includes information about awards by category and type. Information about ISIRs is also included on the dashboard for the Financial Aid Director. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting how financial aid is being awarded. This includes a graph for awards by type, ISIRs received by date, and ISIRs selected for verification.
- **ISIR Analysis.** Displays graphs detailing information about the ISIRs received by your institution. This includes a graph for the total number of ISIRs, ISIRs selected for verification, and number of students with missing documentation.
- **Award Type Analysis.** Displays graphs detailing information about the different types of awards students have received. This includes a graph for federal awards, institutional awards, state awards, and other awards.
- **FA Award Analysis.** Displays graphs detailing the amount of money that has been awarded. This includes a graph for FA award amount by category and the average award amount.

Sample Dashboard

Figure 5: Examples of the FA Director Dashboard



Dashboard Components

Table 9 lists the components of the FA Director dashboard.

Table 9: Dashboard Components Used with the FA Director View

Tab	Item
Main	FA Awarded By Year
	Awards by Award Type
	Pell-Eligible Students
	Enrolled Students FA
	ISIRs Received By Date
	ISIRs Selected For Verification by CPS
ISIR Analysis	Total ISIRs
	Student Documentation Status
	CPS Selected ISIRs for Verification per FA Counselor
Award Type Analysis	Federal Awards
	Institutional Awards
	State Awards
	Other Awards
FA Award Analysis	FA Award by Category
	FA Award Average

Assistant FA Director Dashboard

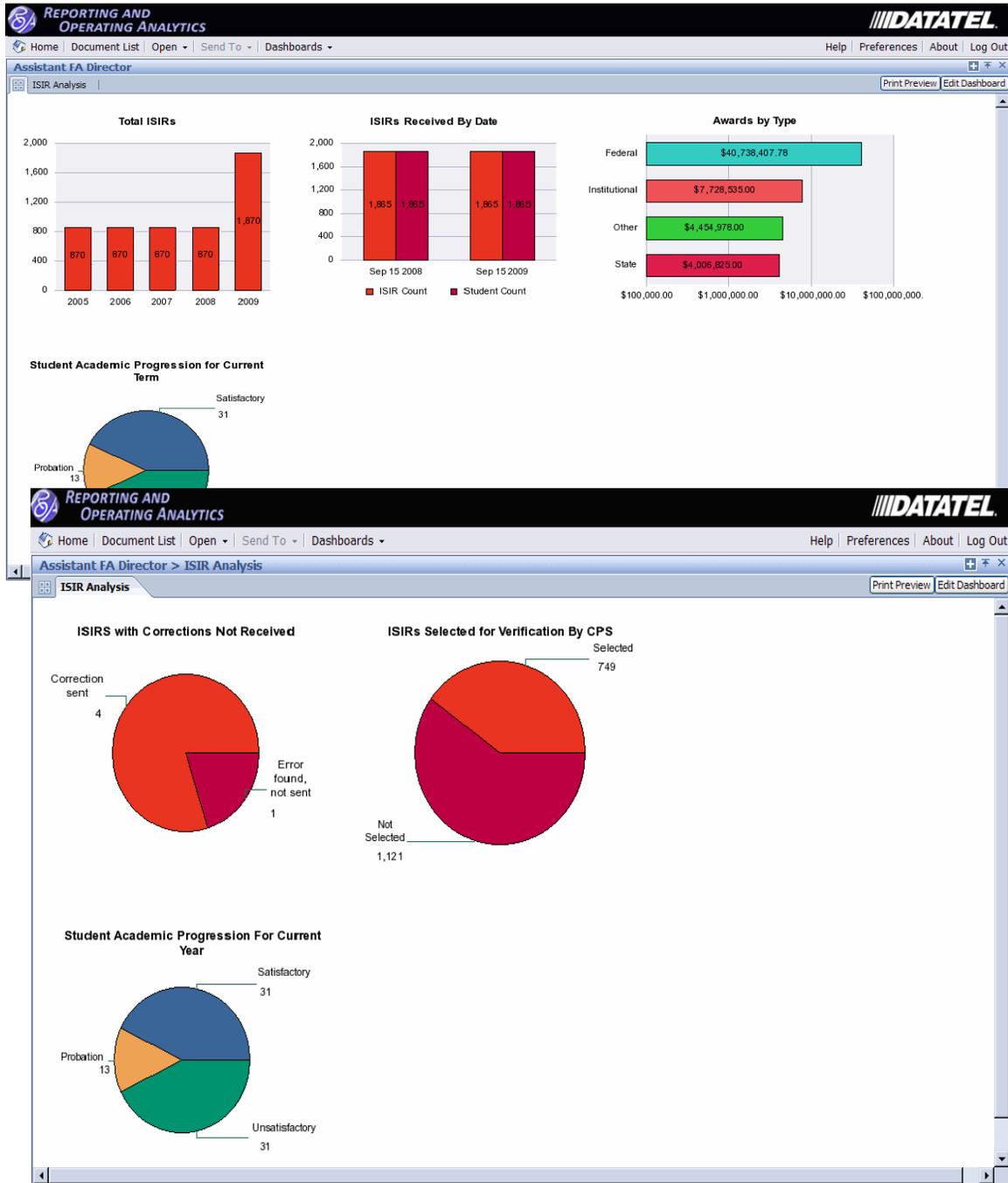
Overview

The Assistant FA Director dashboard illustrates the information your institution has about ISIRs, including how many ISIRs have been received and by their type. The dashboard includes analysis of the ISIR data, including the number of ISIRs selected for verification. Also included on the dashboard is information about students satisfactory academic progress (SAP). The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting information about ISIRs and SAP. This includes a graph for the total number of ISIRs, awards by type, and student academic progression for the current term.
- **ISIR Analysis.** Displays graphs detailing information about the ISIRs received by your institution. This includes a graph for the ISIRs with corrections and the number of ISIRs selected for verification.
- **Award Type Analysis.** Displays graphs detailing information about the different types of awards students have received. This includes a graph for federal awards, institutional awards, state awards, and other awards.
- **FA Award Analysis.** Displays graphs detailing the amount of money that has been awarded. This includes a graph for FA award amount by category and the average award amount.

Sample Dashboard

Figure 6: Examples of the Assistant FA Director Dashboard



Dashboard Components

Table 10 lists the components of the FA Assistant Director dashboard.

Table 10: Dashboard Components Used with the FA Assistant Director View

Tab	Item
Main	Total ISIRs
	ISIRs Received By Date
	Awards by Award Type
	Student Academic Progress for Current Term
ISIR Analysis	ISIR Corrections
	ISIRs Selected for Verification by CPS
	Student Academic Progress for Current Year
Award Type Analysis	Federal Awards
	Institutional Awards
	State Awards
	Other Awards
FA Award Analysis	FA Award by Category
	FA Award Average

FA Loan Specialist Dashboard

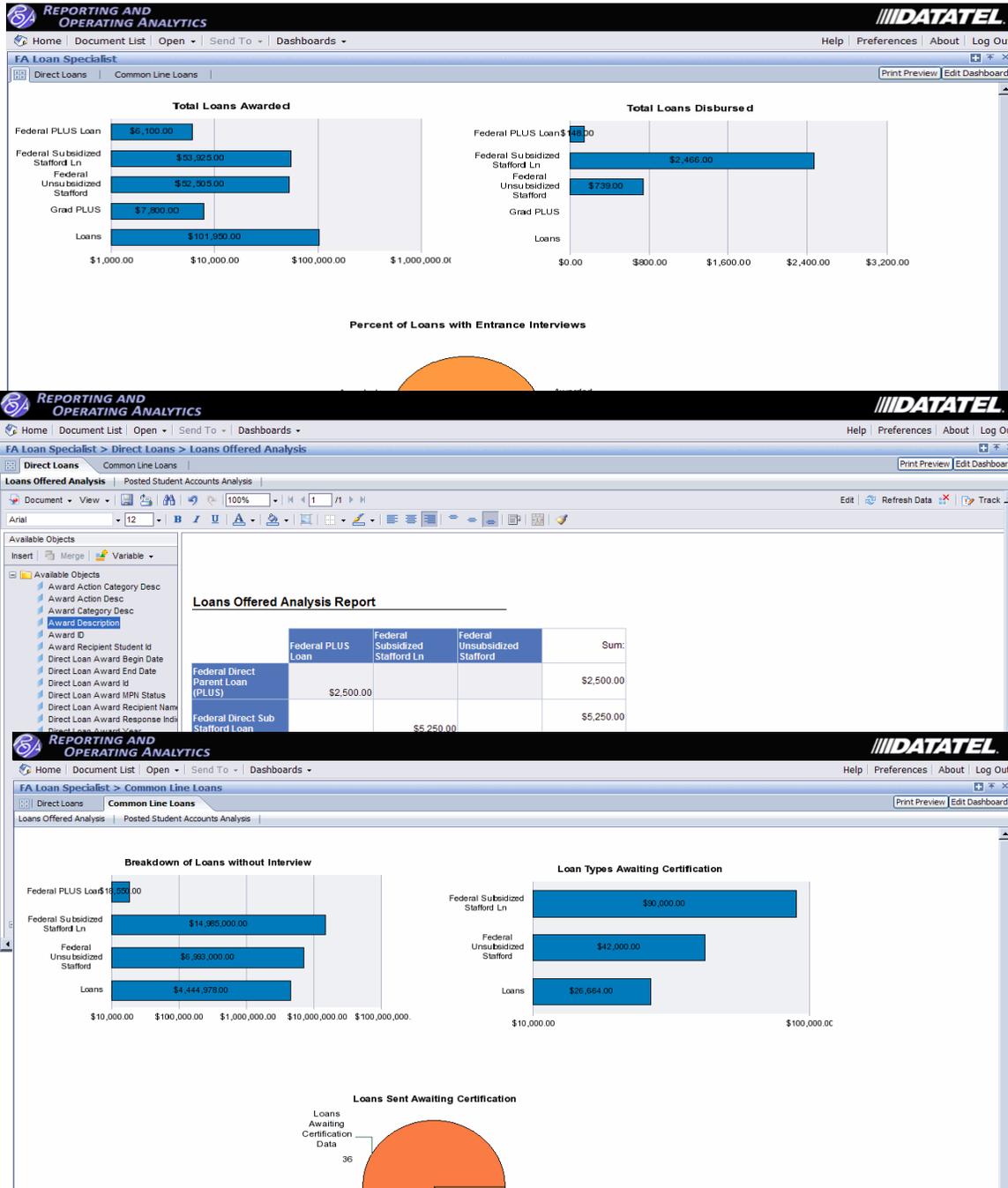
Overview

The FA Loan Specialist dashboard illustrates how many students are receiving loans, the types of loans, and loans awaiting certification. This dashboard includes the ability to view detailed information about loans and allows you to manipulate the data to view the exact measures you need to track your Direct and CommonLine loan information. The dashboard includes the following tabs:

- **Main.** Displays graphs highlighting the loans that have been awarded and disbursed. This includes a graph for the total loans awarded by type, the total loan disbursed by type, and the percentage of loans with entrance interviews.
- **Direct Loans.** Displays graphs detailing information about the Direct loans that have been awarded. This includes a graph for the total loans disbursed, breakdown of loan without interviews, and total amount of the loans awarded. Also included is one sub-tab where you can do analysis on the loans offered.
- **Common Line Loans.** Displays graphs detailing information about the Common Line loans that have been awarded. This includes a graph for a breakdown on the loans without interviews, loans sent awaiting certification, and loans types awaiting certification. Also included is one sub-tab where you can do analysis on the loans offered.

Sample Dashboard

Figure 7: Examples of the FA Loan Specialist Dashboard



Dashboard Components

Table 11 lists the components of the FA Loan Specialist dashboard.

Table 11: Dashboard Components Used with the FA Loan Specialist View

Tab	Item
Main	Total Loans Awarded
	Total Loans Disbursed
	Percent of Loans With Entrance Interviews
Direct Loans	Loan Types Originated
	Breakdown of Loans w/o Interview Direct
	Direct Loans Awarded
	Loan Types Awaiting Origination
	Direct Loans Analysis Report
CommonLine Loans	Breakdown on Loans w/o Interview CommonLine
	Loan Types Awaiting Certification
	Loans Sent Awaiting Certification
	CommonLine Loans Analysis Report

