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COURSES

The UNIVERSITY NON-CREDIT COURSE UPDATE Screen: ARUCNU

Purpose: The purpose of this screen is to view, create, and maintain or delete non-credit courses on the University Course Master (UCM).

ARUCNU actually consists of two pages in order to accommodate all the information needed for a course record in the University Course Master. This document often makes general reference to the ARUCNU screen, but where specificity is needed, we will refer to page #1 and page #2. The use of PF7 will move the user back from page #2 to page #1, and will give a "This is the first screen" message if the user is already on page #1. Likewise, the use of PF8 will move the user forward from page #1 to page #2, and will give a "This is the last screen" message if the user is already on page #2.

This screen is available for update or inquiry. In general, Assistant/Associate Deans for Continuing Education and their staffs have update ability on this screen, as well as a designate of the Office of the University Registrar for cleanup and file maintenance functions. Other users will be granted inquiry access to this screen.

Skipping to (Viewing) a Record on the UCM.

A user of the ARUCNU screen must first skip to a record as follows:

- ACTN = 'S' Skip to the record (Required)
- ABBREV = A five-character course abbreviation (Required)
- NUMBER = A four-digit number, followed by an optional suffix (Required)

The combination of characters used in the ABBREV + NUMBER will be referred to as the "key" throughout the remainder of this document (e.g., B LAW 5038, ENGR 5377A).

The system then attempts to find that record. This step is necessary even if it is known that the key entered is a new course. The system must attempt to find that record first. The system does not check, at this point, on the validity of the entries; it merely attempts to find a matching UCM record based on the key information entered.

If a course matches the key entered, the system will display all the screen information about the most recent course that is available on the UCM. Any user granted inquiry capability will be able to view all field values of the course thus displayed. A user granted update capability would likewise be able to view all fields, and may then want to proceed with changes using the 'C' action code described below.

A course might match the key entered, and therefore display all the associated information. If, however, the course has ended, it is possible to enter an effective semester later than the ending semester of the one displayed, skip to it again, and the system should display "no course found for key entered", as in the next paragraph.

If no course is found that matches the key entered, a message will be displayed indicating "no course found for key entered". A user with inquiry capability will know that the course being searched for
does not exist on the database. A user with update capability may now proceed to add that course to the database, if desired, by proceeding with the instructions for the 'A' action code as described below.

**Adding a Course to the UCM Using the ARUCNU Screen.**

Only users with update capability will be able to add courses to the UCM. A user wishing to add a course to the UCM must first attempt to search the UCM by skipping to that record, as described above. Therefore, the first step is to follow the instructions outlined above, using an 'S' in the action field, followed by an appropriate abbreviation, number, and suffix (the key).

If the message indicates that there was "no course found for key entered", the user may now proceed with the following instructions to create the new course and add it to the database:

The user changes the 'S' to 'A' in the Action Field. If the ABBREV, the NUMBER, or the SUFFIX are changed at this point, the user will be required to skip to the record first.

The user then begins to fill in the required information on the screen. The repeated use of the "enter" key will prompt the user to what needs to be filled in, and will check entries already made. Or, the user can enter several fields at once, or all fields, and again, the use of the "enter" key will check for any errors or unfilled fields. The user **must** enter:

- Semester effective, the first semester the course is available to be offered. The form must be SSYY (e.g., SU95, FA95, etc.)
- Department. Must be a valid department in the college of sponsorship, checked against a code table.
- Educational Value Measure (EVM) type. Checks a code table of one-character alphabetic codes, which will correspond to a particular type of EVM.
- Grade type. Again, checks a code-table for a one-character alphabetic code which corresponds to grading types approved in the system. The valid codes are as follows: Q = quality grades (A,B,..F); P = participation grades (S or X); B = either Q or P may be used for a section, but not both in the same section; N = no grades are given at all.
- Minimum and maximum range (could be the same number) for the units that correspond to the EVM above. Minimum could be zero, but not blank. Maximum could be zero, but not blank. System will check that the minimum is not greater than maximum. Both must be numeric between 0.0 and 999.9.
- Short title. The short title will be limited to 40 characters. It is suggested that periods NOT be used to therefore maximize other available characters. This will be the title which ultimately appears on the student's transcript. It will be left-justified.
- Course title. This is the full title of the course and if possible, without abbreviations. Each line will be left-justified. A total of 150 characters are available if needed. Periods and other special characters may be used.
- Course description. This is a full and complete description of the course. Course proposers are asked to be complete and thorough in describing the content of the course, using a minimum of jargon or acronyms. Each line will be left-justified, and again, with no abbreviations if possible. A total of 624 characters are available.
On the first page, the ending semester is optional. If the ending semester is blank, that will mean the course continues to be available for offering. If the ending semester is entered, it must be greater than or equal to the effective semester, and must be a valid SSYY entry.

Also on the first page, the college will be derived by the system from the department code. The security system will check that the college code matches the user's college. That is, update capability is only granted within the user's college. The CIP field and last update fields are also derived by the system, and will not be available to be filled in by the user.

On page #2, the user may enter up to five participating colleges, departments, and percents. If no entry is made in this field, the system will default to the primary college, the primary department, and 100% upon the first use of the "Enter" key. If entries are made in this field, the system will check that the percentages add up to 100% and that the primary college's percentage is greater than or equal to any other college's participation. The system will check for valid college codes and department codes. It is permissible to show several departments from the same college, but again, the primary college percentage must be greater than or equal to any other college, and the department shown on screen #1 must appear in the list.

Also on page #2, additional information about the course can be provided that is not part of the course description, but may assist the offering unit in obtaining more information about the course: facilities needed, field trip required, computers or other equipment needed, or special campus restrictions that may apply for some pilot courses. This field is a total of 468 characters in length.

Once all required fields are filled in, if the user is still on page #1, the next use of "Enter" will present page #2 to the user, even though all fields on page #2 are optional. (In the absence of other entries, the primary college and department will be brought in by the system with 100% in the percent field.) Then, another use of the "Enter" key will prompt the user to hit the PF12 to update the database. If the PF12 is used, the system will be updated and a message will be displayed that the UCM was successfully updated. If the PF12 was used prematurely, it will first do all the data checking specified above, and if all fields are error-free, the database will be updated and the appropriate message displayed. If errors are detected, the system will highlight the error and treat it as a use of the "Enter"; the database will of course not be updated in this case.

**Changing Courses on the UCM.**

In general, changes will be very rare to the UCM. A user with update capability will be able to make changes. As always, the user must first skip to the record, using the 'S' in the Action Field and the course key. If the record exists, it will be displayed.

To find out if and how a UCM record can be changed, the user with update capability should now place a 'C' in the Action Field and press "Enter". The system will then display one of two messages:

"TCM records have been created for this course". If this message is displayed, the only fields that can be changed are the ending semester, the participating colleges and the percentages, and the additional course information field. Also, the range of units can be widened. If the ending semester is changed, it cannot be less than the effective semester or less than any TCM records that now exist for the course. If the participating colleges or percentages are changed, the usual checking will occur on this field: the primary college must have a percentage greater than or equal other colleges, and the percentages must add up to 100%. The additional information field can be modified (or blanked out if the restrictions are now being removed).

"No TCM records have been created for this course". If this message is displayed, all fields that could originally be entered when the course record was added (other than the
key itself) can now be changed. Again, all data checks are done on changed fields, as described earlier. The effective semester can not be changed backwards if it will make this record overlap a duplicate key of another UCM record. Likewise, the ending semester cannot be moved forward if it will now cause this record to overlap a duplicate future UCM record.

In either of the above cases, if all requirements are met, the system will remind the user to use the PF12 key to update the database. At this point, if the user uses the PF12 key, the database is updated, and a message is returned to the user that the database was successfully updated. If the user attempted the PF12 key before proceeding through the above steps, the system will allow the update of the database but all the above checking is done first. If errors are detected, it treats the action as a use of the "Enter" and prompts the user to fix the error. In other words, the premature use of the PF12 key will be supported but only if the fields are error-free, and will be treated as an "Enter" is errors are detected.

Deleting a Record on the UCM.

The use of the "delete" will be VERY RARE. Courses that are to be ended or no longer available for offering should be closed by filling in an appropriate ending semester, and not by deleting the course. In those rare instances in which it is thought necessary to actually delete a UCM record, it is necessary to first skip to the desired record, using the key as described above. Then the user will enter a 'D' in the Action Field, and depress "Enter". The system will then display one of two messages, as described above, and for which these actions are appropriate:

"TCM records have been created. Course cannot be deleted.". In this case the user cannot delete the course. No further action is appropriate. The use of PF12 is treated like an "Enter", and again displays the same message.

"TCM records have not been created for this course". In this case a delete may be done. The user is prompted to hit the PF12. If the PF12 is used, the course is removed from the database, and the user receives an appropriate message.

The EASY Form to Propose and Create New Courses: NCRD

Purpose: The purpose of the EASY form NCRD is to allow offering units to propose new non-credit courses to the colleges in a streamlined, paper-less environment, and if approved, to allow colleges to add those courses to the database without having to re-key the information. It should be emphasized that courses may still be proposed to colleges by means other than this EASY form; the form is simply meant to provide an electronic medium for offering units to get their proposals reviewed quickly and have new courses available for offering with minimal delay. It is a natural EASY application, but it does not exclude other means of proposing courses or having them added to the database via the ARUCNU screen if that is more appropriate in a particular situation.

This form can be initiated by anyone with access to EASY, who will then fill in the appropriate fields on the electronic form, including a budget number which merely identifies the offering unit. The form must next be approved by the Director of Continuing Education (DCE) in the offering unit. Thus, the DCE will be aware of all new course proposals coming from the offering unit. Next the form is routed to an appropriate college X-code userid. Colleges can then re-route or forward, as they see fit, and can add more notes in the note-pad area as desired. Colleges can agree to percentages of participation as the form is re-routed or forwarded.
Procedures for Offering Units to initiate the approval of a new non-credit course:

**Area Representative**
1. Select IBIS ADMIN MENUS from the COM-PASS screen.
2. Key "NCRD" in the NEXT FUNCTION field and press ENTER.
3. Complete all required data fields, then enter "ADD" in the Form Action field to add the form to the system. Next enter "SUB" in the Form Action field and press PF12 to send the form to your Director of Continuing Education.

**Director of Continuing Education**
1. Select IBIS ADMIN MENUS from the COM-PASS screen.
2. Key M2AS in the NEXT FUNCTION field. If there are forms awaiting approval, key "BAFM" in the "NEXT FUNCTION' field to browse the forms that are awaiting action. If no forms are awaiting action, you can end the session.
3. If there are forms awaiting action, key "PAFM" to get the first form to be approved, or select the one you want to see by number.
4. Review the content of the proposal, make any necessary changes, and decide which college should receive the proposal.
5. The DCE may enter any of the following actions in the FORM ACTION field: CHG to change information on the form; REJ to send the form back to the originator; or APP to approve the form and send it on to the appropriate college.

**Required fields.** The person initiating the form needs to fill in the following fields before routing the form to the DCE; the data checks will occur the same as indicated above on the ARUCNNU screen for those fields that must be filled in. Other fields can be entered by the college and will likewise be checked before updating the database:

**PAGE 1**
Semester effective. This field must be entered by the initiating office and must be in the form SSYY.

EVM Type. Must be suggested by the offering unit, and will be checked against a code table.

Grade Type. Can be completed by the offering unit. Will default to "Not Graded."

Minimum & Maximum Units. Must be entered by the offering unit, and could be the same number. The range can be changed or corrected by the college.

Short title. The short title must be entered by the offering unit, and can be changed by the college.

Hours of instruction. The hours of instruction must be filled in but will not update the database. This is just a double-check for the college to assure sufficient instruction hours for the number of units being requested.

Course title. The longer, unabbreviated title must be entered by the offering unit, and can be modified by the college.

Course description. The course description must be entered by the offering unit, and can be modified by the college.
PAGE 2
Participating colleges and percents. The offering unit is not required to enter anything in these fields. If more than one college is to be involved, the offering unit can include several colleges. The primary college may change these fields. As above, the percents must add up to 100%, and the primary college percent must be greater than or equal to any other college shown. Colleges can use forward and re-route to share information about multi-college sponsorships.

Additional information. This field can be entered by the offering unit, and can be modified by the college.

PAGE 3
Note-pad area. The offering unit might use the note pad to specify a faculty name for a one-time-only offering, or the note pad could be used to indicate anything that the college should know about this new course. The note pad information is NOT written to the database.

The EASY form will follow the approval path specified for each offering unit. Colleges can re-route or forward as needed to maximize input and obtain all necessary approvals. The primary college must be the college to ultimately update the database with the final approval.

THE QUICK SCAN OF THE UCM - Screen ARICNQ

Purpose. As more courses are added to the database, colleges and offering units will need a screen to scan course abbreviations, numbers, and titles on the UCM. A screen that is used much like the directory search in Emc2 will permit users to specify a starting point and then see a screen full of courses, sorted by abbreviation and number, starting with the indicated course or the first course immediately following.

All courses in the UCM can be displayed, including inactive courses.

This is an inquiry-only screen. A field is provided for the search-id, which will be the potential key to match a course in the UCM. No attempt is made to check the validity of what the operator enters; it is simply the starting point to attempt the search. It is possible to enter only a course abbreviation (and not a number), which will then begin the search with the first course using that abbreviation in the database. If an abbreviation and a number are used, it will begin with the first course matching that search-id, or the first course following if there is not an exact match.

It is also possible to use the search-id to find words or parts of words that exist in the short title of the course. For example, if the operator would like to have the system display all of the courses that have the word "math" in the title, he/she should enter "=math" in the first five spaces of the search-id and press ENTER. The system will return with all of the courses that have those four letters (math) in any part of the title. Users can use this technique to scan the entire UCM database to find courses that may be of interest to them.

Repeated use of the "Enter" key will scroll the list forward, and allow the user to view another screen full of courses.

The following fields are shown on the screen, one record per line, showing enough courses to fill the screen:

Status (an * is shown if the course is active)
Course name (course abbreviation, course number and suffix)
Short title (the 40 character title that would be printed on the student's transcript)
Semester effective (the first semester that this course was offered)
Semester end (the last semester that this course can be offered)
REPORTING

The Full Catalog of All Non-Credit Courses Available in RMDS

Purpose: To allow the University community to view all non-credit courses in a convenient yet paperless fashion, the entire catalog of all non-credit courses is available as a report on the Report Management Distribution System (RMDS). This system permits a user to scan the entire catalog of courses, and print selected pages as appropriate.

Courses are sorted by college, and within that, by the course key. Thus, courses are easy to find and sections of the report are easy to print. The report is available to anyone in the University with access to RMDS, but are primarily used by colleges and offering units.

This report which is named REG NCRD UCM ACTIVE COURSES is refreshed monthly, and shows all active courses in the UCM as of the date of printing. All courses (both active and inactive) can be individually viewed on either screen ARUCNU or ARICNQ.

The following fields are shown in this report:

1. In addition to required page titles, the full college name appears at the top of each page of the report.

2. Column headings are provided for course name (key), the department, the EVM type, and units minimum and maximum, the grade type, the short title, the semester effective and the ending semester.

3. The fields described by the above column headings are displayed for each course, followed by the full title, the course description, and the additional information fields, all in a pleasing format that is easy to read.

The Monthly Report of New Non-Credit Courses Available in RMDS

Purpose: For users who might be interested in newly approved non-credit courses on the UCM database, a monthly report will be available on RMDS showing courses approved within the previous month. This report parallels and will replace the “green sheets” (Report of Continuing Education Informal Programs and Instructors) that are now produced and distributed by the Vice President of Continuing and Distance Education, but reflects new courses rather than new sections, and does not list information about instructors.

This report which is named REG NCRD UCM NEW COURSES is sorted by college and then by course key, to permit easy viewing and printing of selected pages. All fields that are printed on the above report of the entire catalog are shown on this report. In particular, the additional information field is shown to identify special requirements for other units contemplating an offering of one of the new courses.
The title of the report clearly identifies the report as "new" courses, and identifies the month in which they were approved. The previous five months’ versions of these reports accumulate in RMDS to provide users with the opportunity to go back and scan previous activity.

To View/print course information using RMDS

1. Select RMDS from your NETPASS ACTIVITY TABLE, and press the appropriate PF key to display the MAIN MENU of RMDS.

2. Enter "V" in the SELECT OPTION field and the name of the report that you want to see (REG NCRD UCM NEW COURSES or REG NCRD UCM ACTIVE COURSES) in the REPORT NAME field, and press ENTER. If you selected the "NEW" courses, up to five versions of the report will be shown on the VERSIONS LIST screen, along with the date that the report was run. Choose the version you would like to display by typing a "D" to the left of the appropriate version. (Only one version of the REG NCRD UCM ACTIVE COURSES will ever be shown)

3. The report will appear sorted by college, course and course number. Since the report is wider than the screen, you will have to press PF11 to see the far right of the report. Pressing PF10 returns to the left side of the report. To see additional pages of the report press PF8, or show previous pages by pressing PF7. If you want to see a certain page of the report, type "PAGE (the page number you want)" in the COMMAND LINE, and press ENTER. If you want to search for a certain word (such as "computer" that appears in the report, type FIND 'COMPUTER' and press ENTER. The system will go to the first printing of the word "computer" on the page currently on the screen and on later pages. Pressing PF5 continues the search. Pressing PF3 will bring back the MAIN MENU screen.

4. To print a copy of the report, enter a "P" in the SELECT OPTION, and the name of the report that you want to print in the REPORT NAME field and press ENTER. The PRINT screen will appear and request that you select the destination of the printing of the report. To route the output to your personal network printer, enter "N" in the SELECT OPTION field and your 8-byte PRINTER ID in the NETWORK PRINTER ID field, and the page numbers of the range of pages that you want to print in the SPECIFY PAGE RANGES: field(s), and press ENTER.

The Weekly Report By College Showing Recent Changes To the TCM

College offices may monitor the activity that goes on from all of the offering units on a timely basis by reviewing this report, which will be run each weekend and distributed to the college dean's offices each Monday morning via EMC2. The course/section information is sorted by course, section, and location, and is intended to show the college's what courses are being planned throughout the system. College dean's may observe who the instructors will be; make sure that course outlines are in their files; or check on any facet of the course offering with the offering unit. If something is incomplete or inappropriate, the dean may use screen ARUCNL to lock the section and prohibit registrations until the problem is corrected.

The Weekly Report By Offering Unit Showing Recent Changes To The TCM

This is the same information that is sent to the college's except that the data is sorted by offering unit, college, course and section. It too is run each weekend, and arrives at the EMC2 address of the head of the offering unit each Monday morning.
SECTIONS

Maintain Non-Credit Course Offering Screen: ARUCNT

**Purpose:** The purpose of this screen is to view, create and maintain the course offerings of non-credit courses on the Term Course Master. All users must enter the course KEY (course key will be described later) to view, create or update data on the screen.

Course offering units have exclusive update capability for their own offerings. All interested units throughout the University with interest in non-credit offerings may be given inquiry capability. In general, it will be a representative of the campus registrar's office who will enter the data that is pertinent to the course; and the financial or bursar representative will enter data that pertains to fees and charges. The fees and charges will be entered by a separate bursar screen labeled ABTN.

The operator may create, update or review a record on the file by entering the letter "S" in the ACTN field and "skipping" to the record and entering the course key. The operator will enter an "A" to create a new record; a "C" to change a record; or a "D" to delete a record (deleting of records should only be done if a course key has been entered incorrectly) The TCM course key includes the SEM OFFRD, COURSE, SECT, PROV/LOC and DEL. The description and process for entering data in each field follows:

**SEM OFFRD** = A four character code that represents the semester or term of offering of the course. The code may be either SP, SU or FA followed by the two-digit year of the offering. Course offering units will determine the appropriate term of offering by using the following rule: if the course ends before June 15 of a year, it is listed as a Spring offering; if a course begins after June 30 of a year, it is listed as a Summer offering; otherwise a course that is offered for all or part of the June 15 to June 30 time frame may be listed as either a Spring or Summer offering at the discretion of the course offering unit. For the purpose of determining which fiscal year the course is assigned to, all SPRING offerings are in the FY ending June 30, and all SUMMER offerings are in the FY starting July 1. The end of the fall period is defined as the commencement day for the fall semester. Likewise, the Summer Session ends with the commencement date for summer. Offering units will determine which semester or session to use for courses that span two or more time periods.

**COURSE NAME** = A ten character code that represents a course that is available to be offered, as shown on the UCM. The first five bytes represent a valid course abbreviation of the university, and the second five bytes represent a course number, where the first four bytes are numeric and the fifth, optional byte is alphabetic.

**SECT** = A three byte numeric field that represents a unique section of the course that is being created or viewed.

**PROV/LOC** = A five byte code that represents the "Provider" or offering unit of the course, and the specific location where the course is actually given. The first two bytes are alphabetic and represent the campus, college, or other offering unit which is offering the course. There are 42 potential providers in the current environment. Each provider is linked to a specific "delivery", or administrative unit. The last three bytes are numeric and represent a specific location either on a campus or an off-campus location where the provider is offering the course.

**DEL** = A one byte field that is linked to sets of provider codes and defines the administrative units or "delivery" for all non-credit offerings. The linkages are shown below:
<table>
<thead>
<tr>
<th>DELIVERY</th>
<th>PROVIDERS</th>
</tr>
</thead>
</table>
| A        | All colleges, except The College of Medicine  
(Providers: AA, AG, BA, BD, CL, CM, ED, EM, EN, HH, ID, LA, SC)  |
| H        | The College of Medicine  
(Providers: HY, HO)  |
| S        | All of the CES campuses including Great Valley  
| E        | Monroeville, State College and Williamsport Centers  
(Providers: MV, SC, WT)  |
| D        | Distance Education  
(Providers: AC [ACSDE]; CR [CREAD]; CP [CONTRACT PROGRAMS]; DI [DISTANCE EDUCATION]; IL [INDEPENDENT LEARNING])  |
| X        | Conferences and Institutes  
(Providers: PS [PENN STATE SCANTICON]; CB [CAMPUS-BASED])  |

The combination of deliveries "E", "D", and "X" represent all of the offering units that report to the Vice-President and Dean for Continuing and Distance Education. The delivery "S" represents all of the offering units that report to the Senior Vice President and Dean for the Commonwealth Education System. The delivery "A" represents all of the colleges, including Capital and Behrend, but excluding the Medical College. (Colleges offer their own courses on occasion without being associated with one of the other delivery units) The delivery code "H" represents the College of Medicine.

The SEM-OFFRD, COURSE, SECT, PROV/LOC and DEL represent the course "KEY". They uniquely refer to a specific section of a course, and as a result, cannot be changed. If an element of a course key is entered incorrectly, the record should be "deleted" and reentered correctly. All five codes are edited against existing code sets in ISIS to assure that the data that was entered is accurate.

When the course key has been entered, the operator presses the "ENTER" key. If the section already exists on ISIS, the record will appear on the screens (there are two pages to this screen), if the record does not already exist, it can be created by entering an "A" in the ACTN field, and pressing the "PF12" key.

The operator may now continue to enter the rest of the data elements that will be used in the creation of the section. Some of the elements are required and some are optional. The data fields can be edited at any time by pressing the ENTER key. If the operator needs help to know what value is expected in a field, she/he should enter a "?" in the first byte of the field. The system will display either a "window" showing the valid values, or an operator message instructing the operator on the proper next step. The operator may at any time press the PF1 key, to cause the HELP screens to appear. The HELP screens have a complete set of documentation for the ARUCNT screen.

**INSTN TYPE** = A three byte alphabetic field that represents the primary type of instruction for the course that is being created. Examples are LEC for lecture; CAI for Computer-Assisted Instruction; WRK for Workshop; etc. This is a required field.
**BEG DT** - A six byte field shown as MMDDYY, that represents the date of the first meeting of the offering. If the offering is a single-day offering, the beginning and ending dates are the same. It is a required field, not a default date.

**END DT** - A six byte field shown as MMDDYY, that represents the date that the course offering ends. It is a required field, not a default date.

**GRADE TYPE** - A one byte alphabetic field that describes the type or types of grading that may be given in this section as prescribed on the UCM by the college. The letter "Q" represents the quality grade (A,B,...,F) type; "P" the participation grade (S, X) type; or "N" for no grade type. If none of the types are entered, the default value is "N".

**EVM TYPE** - A one byte alphabetic field that describes the Educational Value Measurement (EVM) that is appropriate for this course. The type is predetermined by the college dean and is system generated from the UCM file.

**PUBLIC** - A one byte alphabetical field that indicates whether the section may be offered to the general public (P); only to students from a certain company or sponsor under a Contract or Memo of Agreement (C); or to either group (B). If a contract has been signed indicating that a sponsor will be paying the tuition for the course, and an individual attempts to register for the course, the system will send an warning message to the operator questioning the action. The warning message can be overridden at the discretion of the operator.

**UNIT MIN** - A four byte numeric field shown as NNN.N that represents the minimum number of units ("units" is the generic term for C.E.U. or AMA Unit or others depending on the type of unit as approved by the college dean) that this offering may have. If the college approves a single unit amount, then the UNIT MIN and the UNIT MAX are the same value. This value is system-generated from the UCM if the UNIT MIN and UNIT MAX are the same value on the UCM.

**UNIT MAX** - A four byte numeric field shown as NNN.N that represents the maximum number of units for which a student may enroll. A student may register for any unit value within the MIN and MAX range of units. This value is system generated if the UNIT MIN and UNIT MAX are the same value.

**COLLEGE** - A two byte alphabetical code that represents the college that is the primary provider of the course. It is system generated from the UCM.

**SHORT TITLE** - A field that has up to 40 characters and represents the abbreviated title from the UCM. This is the title that will appear on permanent transcripts, class lists and on the printed reports that show course section information. The short title is system-generated from the UCM.

**CANCEL** - A one byte field that is used to cancel a section. If there are no enrollments in the section, the operator from the offering unit that is offering the course, may decide to cancel the offering, and can do so by entering a "C" in the field. If there are enrollments in the section, the system will prevent the cancellation from being made. Enrolled students would have to be dropped from the section before it can be canceled.

**INDIV FEE** - If this offering intended to be taken by any individual (as opposed to an offering intended for a specific audience) and he/she pays the individual tuition fee for the section, the indicator "I" is placed in this field.

**GROUP FEE** - If this section is intended to be taken by students from a company or sponsor under a contract or Memo of Agreement, the letter "G" is placed in this field.
SECTION COMMENT - A 40 byte field that may be used by the course offering unit to further describe a particular feature of the course, or to use in the promotion of the course or for any other reason. This optional information is not permanently kept on the students' transcript but remains with the TCM record.

ENRL MIN - A one to four byte number that represents the minimum number of enrollees that would be required to break even monetarily. The number can be used in the overall budgeting process, but is an optional field.

ENRL MAX - A one to four byte number that represents the maximum number of students that can be enrolled in the section based on room size, faculty preference or any other valid reason. It is the maximum number of students that the system will allow in the section without the offering unit overriding the value (explained in the Registration Specifications). This is a required field.

ENRL EXP - A one to four byte number that represents the expected number of enrollees. This number is usually used as the number to base the budget on, and is optional.

ENRL CNT - A one to four digit number that is the actual count of the number of enrollees in the section. The number is incremented as students register for the section, and represents the number of currently REGISTERED students (Students on the waiting list would not be counted).

EST ENRL - A one byte indicator that may have a value of "Y" for yes or "N" for no, to show whether or not the enrollment in the section is an actual count of registrants or is estimated. The "Y" indicator means the numbers are an estimate. The default value is "N". A "Y" value may not be entered if one or more students are registered for the section.

EST ENR MALE - A one to four byte number that represents the actual or estimated number of enrollees in the offering being displayed, but for which no actual student registrations were rendered. No update can be made if one or more students are registered. Likewise, no students may be registered if this field has been updated. The number, when added to the EST ENR FEMALE, would equal the EST ENR TOTAL.

EST ENR FEMALE - A one to four byte number that represents the actual or estimated number of enrollees in the offering being displayed, but for which no actual student registrations were rendered. No update can be made if one or more students are registered. Likewise, no students may be registered if this field has been updated. The number, when added to the EST ENR MALE, would equal the EST ENR TOTAL.

EST ENR TOTAL - A one to four byte field that is the system-generated sum of EST ENR MALE and EST ENR FEMALE.

BUDGET - This is the 10 byte budget code shown as NN-NNN-NN_AA that represents the FANS budget code of the offering unit of this section (required).

FUND - This is the five byte fund number in FANS of the offering unit of the course (required).

OBJECT - This is the four byte object code in FANS of the offering unit offering the course (required).

SUB-OBJECT - This is the 30 byte sub-object code in FANS of the offering unit offering the course (optional)
COST CENTER - This is the ten byte "cost center" in FANS established by the offering unit (optional).

ACTIVITY - This is the ten byte "activity" in FANS established by offering unit of the course (optional).

DEPT FREE SPACE - This is the 15 byte "department free space" in FANS. The Semester/year of the offering, and the schedule number of the offering are moved into this field and shown as "199394SP103220", as the TCM record is created. Nothing can be entered into the field by the operator.

LOCKED? - This is a one byte indicator generated by the system that shows "Y" if the college dean has "locked" the section prohibiting students from registering; "N' if the section had been locked but the college dean has removed the lock; or is blank if a lock was never set.

LAST UPDATE - The screen will show the USERID of the operator who performed the last update to the ARUCNT screen and the date and time that the update occurred.

At this point, the operator should press the PF8 key to move to page two of screen ARUCNT.

MAINTAIN NON-CREDIT COURSE OFFERING (2)

MEETING DAY(S) - This is a seven byte positional field that is used to show the day(s) of meeting of the offering in a weekly or multi-weekly schedule. The letters "MTWRFSY" represent the days of a week. If a class meets on Monday, for example, the letter "M" would appear in the space immediately below the "M" on the screen. If a class meets on more than one day of a week, each of the appropriate letters would appear to show the meeting days. If a class meets at one time on Monday and another time on Tuesday, a second line is required. Up to three lines may be used in this and the other fields that show date(s), time(s), room(s), and building(s) where the class meets. At least one day of meeting or the abbreviation "APPT" is required.

BEG TIME - This is the time that the class begins, shown as 0800a for 8:00 a.m.; or 1000p for 10:00 p.m. The field is required as described unless "APPT" (Appointment) is listed under "MEETING DAY(S)".

END TIME - This is the time that each class period ends, shown as 0930a for 9:30 a.m.; or 0830p for 8:30 p.m. Required unless "APPT" is listed under "MEETING DAY(S)".

ROOM - This is a four byte a/n field. It lists the room number of a building where a class meets. Required unless "APPT" is listed under "MEETING DAY(S)".

BUILDING - This is an eight byte alphabetic code for the name of a building. Required unless "APPT" is listed under "MEETING DAY(S)".

INSTR NAME/SSN - Two fields with 20 and 9 bytes that show the instructor of the section and her/his social security number. The instructor name is normally shown as "LAST NAME, (comma) FIRST NAME, MIDDLE INITIAL. The social security number of the instructor will be requested if the SSN field is left blank, incomplete or non-numeric. If the social security number of the instructor is not known, the operator may depress the "ENTER" key and the system will allow the instructor name to be entered without entering the social security number.
FORFEIT DATE - This is a six-byte numeric field in which the course fee forfeit date (shown as MM/DD/YY) may be entered. It is only used if the date of the forfeiture of the course fee is earlier than the BEG DT (beginning date) of the course. If the forfeit date is the same as the BEG DT, nothing is entered in the field.

AUDIENCE - This is a five byte alphabetic code that represents the primary audience for an offering. If no audience code is listed, the system default is to audience code "GENRL" for general.

AUD DIV - A five byte alphabetic code which identifies a general vocational field. It's use is optional.

AUD SUBDIV - A five byte alphabetical code which identifies a part of a AUD DIV. AUD DIV. AUD SUBDIV is optional except that AUD DIV is required to have a AUD SUBDIV (Note that the AUD DIV codeset is not defined as of this writing).

COURSE VARIABLES - a five byte alphabetical code which represents course variables that have no extra charge beyond the normal cost of the course, but may vary with individuals enrolled in the offering. There may be up to four occurrences, but all are optional.

C E ADMINISTRATOR - This is the name of the Area Representative or other administrator who has administrative responsibility for the offering. The name is normally shown as LAST, FIRST, MI. This is a required field.

ACADEMIC ADMINISTRATOR - This is the name of the faculty member in the academic unit that either developed the course, or has been designated by the college as the person to contact regarding the content of the course. The name is normally shown as LAST, FIRST, MI. Use of this field is optional.

COURSE CO-PROVIDERS - Each section will have a primary provider; that is, each section may be offered by only one offering unit. Other offering units may, however, participate in the offering. An example would be a conference that would have joint participation between the Wilkes-Barre Campus and the Conference Center. If they were participating equally, the operator would enter the delivery and provider codes for both the Wilkes-Barre Campus and the Conference Center with 50.0% in each percentage (%) field. This will allow application programs to be written that could show that offering units either offered or participated in the offering of courses; or it could be used in some later release of NCRR to divide income depending on the percentage of involvement of each provider. If no co-providers are entered, the system assumes all 100% of the offering is provided by the offering unit shown in the PROV/LOC field.

At this point, all of the required and optional data elements have been entered. Pressing the ENTER key will edit all of the fields, and if passed, the system will return the message "PRESS PF12 TO CHANGE THIS COURSE OFFERING". The transaction is now completed by pressing PF12. The first page of ARUCNT will now appear with the system-generated SCHEDULE NUMBER in that field. This six byte number uniquely identifies this section of the course, and will be used to link the section data with the student data as students are registered for the course.

MAINTAIN COURSE OFFERING FINANCIAL screen ABTN

Purpose - After screen ARUCNT has been created by an operator representing the registrar’s area, certain additional elements must now be entered by someone representing the financial side of the offering unit. Each unit will define who those people will be, but they may not be the same person.
A section is not fully created nor may students be registered until screen ARUCNT and ABTN have been fully updated.

The KEY for this screen will be the six-digit schedule number and the SEM (semester/year shown as FA95). The operator will enter an "S" in the ACTN field and the schedule number in SCHED NUM field and the semester/year in the SEM field and press the ENTER key. The system will bring up the TCM course key (SEM, COURSE NAME, SECT, PROV/LOC AND DEL) with a "C" in the action field. The operator will check to make sure that the appropriate course/section was entered.

The FANS fields will be displayed (BUDGET, FUND, OBJECT, SUB-OBJECT, COST CENTER, ACTIVITY and DEPT FREE SPACE). In addition, INDIV FEE and GROUP FEE will also be displayed. The operator will use an action code of "C" to make entries on the screen. Neither an "add" nor a "delete" (An "A" or a "D" in the ACTN field) may be made using this screen.

REGISTRATION INDICATOR - A one byte field that allows the financial person to indicate that all fees have been set and that registrations may now be accepted. A value of "Y" must be entered to allow registrations. If the field is either blank or has a value of "N", no registrations will be accepted.

INDIV FEE - If the Individual Fee Indicator was set to "I" on the screen ARUCNT, the system will prompt the operator to enter an individual charge in the INDIVIDUAL AMOUNT field. The field is all numeric, but could be zero if the section is being offered for some special purpose at no charge. Therefore, the field must have a value (99999.99) to represent the tuition charge; or 00.00 to represent a course/section for which there is no tuition. Some value must be entered.

GROUP FEE - If the Group fee indicator on screen ARUCNT was set to "G", the offering unit must have completed the essential parts of the "Maintain Contract or Memo of Agreement" (ABKC screen) first. The system will REQUIRE that a linkage be made between the contract or memo and the section by entering the Contract or Memo of Agreement Number in the CONT/MEMO NUMBER field(s). (Note that the CONT/MEMO NUMBER - is two fields. The first one byte field must be either a "C" to indicate "contract" or an "M" to represent "Memo of Agreement". The number field is 12 bytes long and may be either alphabetic or numeric. The a/n number must be left-justified in the field. It must exactly match the number already entered into the Memo Of Agreement/Contract screen (ABKC), AND match the Schedule Number of the section).

The operator now will press the ENTER key. The Group Fee Amount, the Sponsor or Company Name and an abbreviated Project Title will now appear in the appropriate fields verifying that the linkage between the section and the contract or memo has been made. (It is possible, however unlikely, that a section may have both an individual fee and a group fee).

GROUP AMOUNT - Is a 9 byte numeric field that is system-generated, and shows the dollar amount of the contract or memo of agreement from that entered on the Contract/Memo screen ABKC. This amount cannot be changed using this screen. The amount can only be changed using screen ABKC.

COMPANY NAME/PROJECT TITLE - is two fields of 19 and 18 bytes that will show the first 19 bytes of the company/sponsor name and the first 18 bytes of the Project Title. The information that is displayed here, may be entered or changed only on the Contract/Memo screen ABKC.

LAST UPDATE - The USERID of the individual who last updated this ABTN record and the date that the update was entered, is displayed by the system.
The user will now be able to enter additional charges and discounts along with the appropriate OBJECT, SUB-OBJECT COST CENTER and ACTIVITY. Only the OBJECT is a required field. If no entry's are made in these fields, all registrants will be paying exactly the same amount for the course, with no discounts or extra charges for any registrant. There may be up to 99 occurrences of these fields, which would appear on subsequent pages of the screen, if needed.

**CODE** - A five-byte alphabetic field that represents a course variable that has an additional charge. It may also be a code to represent a discount. The amount shown in the AMOUNT field (optional), represents the dollar value of the additional charge or discount that is associated with the code.

**AMOUNT** - A eight byte numeric field shown as ±NNNNN.NN. If a valid code is listed, an amount must be shown with the appropriate "+" or "-" symbol in the first byte of the field. The assumed value will be "+", so a symbol must be entered only if the value is minus.

The operator should now press the ENTER key to have the system perform all of the necessary edits. If all fields pass the edits, the message "PRESS PF12 TO CHANGE COURSE FINANCIAL RECORD" will appear. The operator should now depress PF12 to complete the update transaction.

**LOCK/UNLOCK NON-CREDIT SECTION screen ARUCNL**

**Purpose** - Occasionally, a course offering unit may create a section of a non-credit course that does not have the concurrence of the dean of the college that offers the course. The reason may be that the instructor has not been approved, or it may be any other academic reason. This screen allows the college dean to "lock" a section of a course so that students can not be registered. When the issue which caused the dean to lock the section has been resolved, the dean will use the screen to "unlock" the section.

The operator in the dean's office will have the option of locking a section by pathing to ARUCNL and entering the section KEY for the section that she/he plans to lock. The section key is SEM OFFRD, COURSE, SECT, PROV/LOC, and DEL. When the ENTER key is pressed, the SCHED NUM, BEG DT, END DT, COLLEGE, SHORT NAME, INSTRUCTOR'S, SSN, SECTION COMMENT, BEGIN TIME, END TIME, MEETING DAY(S), and LAST UPDATE will appear on the screen.

The cursor may be moved to the LOCKED field, and will allow the operator to enter a "Y" if the section is to be locked, or an "N" if the section was locked and now is being unlocked. A blank field will default to unlocked.

The operator now presses the ENTER key. If the edits are passed, a message will appear (PRESS PF12 TO CHANGE THE COURSE RECORD). Pressing PF12 will update the record, and the transaction is completed.

**REPORTS FROM THE TCM**

**WEEKLY REPORT SHOWING RECENT CHANGES** - This is a report that will be run each weekend and is distributed to the college dean's offices each Monday morning via EMC2. The course/section information for that college is sorted by course, section, and location, and is intended to show the colleges what courses in their college are being planned throughout the system. College deans may observe who the instructors will be; make sure that course outlines are in their files; or check on any other facet of the offering with the offering unit. The report will show if the section has a "lock"; or if the entry is on the report due to the section being new or changed. Sections that had some element of the record changed will be shown with an asterisk beside the element that was changed. If
something is incomplete or inappropriate, the dean may use screen ARUCNL to lock the section and prohibit registrations until the problem is corrected.

WEEKLY REPORT SHOWING RECENT CHANGES BY THE OFFERING UNIT - This is the same information as in the previous report, except that the data for each offering unit is sorted by location (PROV/LOC), course and section and is sent to the mail account of the head of the offering unit each Monday morning via EMC2.

SEMESTER REPORT SHOWING ALL SECTIONS IN A SEMESTER - A report that can be ordered via The EMC2 BULLETIN BOARD by either colleges or offering units to show all courses from a college that were offered within a semester, sorted by course and number, then location; or to show all courses offered at an offering unit sorted by college, course and number. To locate the electronic request form, select "Bulletin Boards" from the EMC2 Mail Menu, then enter an "L" (for Letters) in the USERFORMs area, and finally select "SEMESTER REPORT SHOWING ALL SECTIONS IN A SEMESTER" and choose the sort order.

NON-CREDIT COURSE ENROLLMENT COUNTS - screen ARIRNC

This is an on-line screen labeled ARIRNC that will allow the offering unit to see the up-to-date enrollment information for their unit. The operator will key in the semester (FA95) and either the two-byte provider code, or the 5-byte provider/location code and press ENTER to see the enrollment data for the location that was selected. The ENRL COUNT is subtotaled by sub-unit and totaled by unit.
STUDENTS

1. The CREATE NCRR STUDENT screen: ARUSNP

Purpose: The purpose of this screen is to create all required data, display most student data, and to change selected data that is recorded for students who enroll for non-credit courses.

All students that are created in the system will be entered using their social security number as their "account number". If a student has not supplied the operator with her/his valid social security number, and reasonable attempts to secure the valid number have failed, the system may be used to assign a unique number to the student. Students should be informed on any printed forms that the number that was assigned by the system should be saved for future reference.

DISPLAYING A RECORD FROM THE STUDENT FILE
To Display a record, the operator will path to screen ARUSNP, and enter an "S" in the ACTN field, and the social security number (all 9 characters must be numeric) in the STUDENT ID field, and press the ENTER key to "search" for the record. If that student's ID is in ISIS, all of the data from the student file will be displayed. If that ID is not on ISIS, either message "No student record found" or "Invalid ID for student" will be displayed.

CREATING A RECORD ON THE STUDENT FILE
To Create a record, the operator will follow the display procedure as stated above to make sure that a record does not already exist for that ID number. When the message "No student record found" appears, the operator should enter an "A" in the ACTN field and the full name in the name field and press ENTER. A "pop-up" of the STUDENT LOOK-UP screen (AMIA) will appear the name of the student at the top of the page. The operator will view the records that are alphabetically similar, to make every effort to prevent the creation of a second record for that student. If the student name does not appear under a different number, the operator should press ENTER, and the ARUSNP screen will reappear, and request that the STUDENT ID be entered again to verify that the number that was entered was keyed correctly. If the student appears on ISIS under a different number, the operator should determine which one is correct and either correct the existing record or inform the registrar of the offering unit of the incorrect number.

To create a record when no Social Security Number is supplied by the student, the operator enters an "S" in the ACTN field, an "8" (all system-assigned numbers begin with an "8") in the first space of the STUDENT ID field, and presses ENTER. The system will give the message, "No student record found". The operator then enters an "A" in the ACTN field, the gender, the full name in the name fields, the full address and telephone number and presses ENTER. The system displays a "pop-up window" of the AMIA screen with the name of the next student alphabetically at the top of the screen. (The operator should write down the number that has been assigned by the system, because it will be requested to be entered a second time.) If the student's name DOES NOT appear under a different ID, the operator depresses ENTER and the system returns the operator to Screen ARUSNP with blanks in the STUDENT ID field. The operator is now required to enter the number a second time. If the student's name DOES appear on AMIA under a different ID but with exactly the same last name, first name and first initial of the middle name, the system will send an warning message to the operator informing the operator of the possibility that the student may already exist in ISIS under a different number. The operator should determine if the existing number in ISIS is correct, and either use the existing number, or inform the registrar of the fact that the student's number should be changed.

Pressing the TAB key will cause the cursor to stop in the first space of the next field that should be updated. The operator may press the ENTER key at any time to allow the system to edit the values that are entered to that point.
The operator will now proceed to enter the following values:

**Gender** - The operator will enter an "M" if the student is a male, or an "F" if the student is a female. One or the other is required.

**Ethnic** - The operator will enter the alphabetical code that represents one of eight different ethnic backgrounds according to the following format. The value entered is converted to a two-byte code which is stored in ISIS. Once a valid code is entered, the value shown on the screen is "YES" indicating that a valid value is stored. If a valid value is not entered, the value shown is "NO", indicating that the student has no value stored in ISIS.

<table>
<thead>
<tr>
<th>Value Entered</th>
<th>Value Stored</th>
<th>Ethnic Classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>1a</td>
<td>American Indian</td>
</tr>
<tr>
<td>b</td>
<td>1b</td>
<td>Alaskan Native</td>
</tr>
<tr>
<td>c</td>
<td>2</td>
<td>Black American (not of Hispanic Origin)</td>
</tr>
<tr>
<td>d</td>
<td>3</td>
<td>Asian American or Pacific Islander</td>
</tr>
<tr>
<td>e</td>
<td>4a</td>
<td>Hispanic American (not Puerto Rican)</td>
</tr>
<tr>
<td>f</td>
<td>4b</td>
<td>Puerto Rican</td>
</tr>
<tr>
<td>g</td>
<td>5</td>
<td>White American</td>
</tr>
<tr>
<td>h</td>
<td>6</td>
<td>Foreign (in U. S. on student or temporary visa)</td>
</tr>
<tr>
<td>blank</td>
<td>blank</td>
<td>(value displayed is &quot;No&quot;)</td>
</tr>
</tbody>
</table>

**Birth Date** - is entered as MM/DD/YYYY. MM must be 01 - 12; DD must be 01 - 31; and YYYY must have "19" or "20" in the first two bytes, and all four bytes must be the current year or earlier.

**Area of Interest** - is a five byte alphabetical code that must match a valid course abbreviation or a "program" code that is defined in the program file. Up to three areas of interest may be entered. If the student does not indicate a specific area of interest on her/his registration form, the system will default to the course abbreviation of the last (or current) course the student has completed. The semester date (FA94) that the course was taken and the provider code (YK) for each course abbreviation will be derived from the enrollment file and stored in the student file. If a student enrolls for a second course, the system will move the course abbreviation, semester/year and provider code from the first area to the second area. Up to three different sets of data may be listed. The system will save all three sets of data and display them on screen ARUSNP. If the area of interest is a valid "program" code from the program file, the campus location of the operator and the current semester date will be entered into the first area when the record is updated. Valid course codes may also be entered on-line to show a student's Area of Interest, and are stored in the same manner.

**Student name** - There are five fields associated with the student name: last; first; middle; suffix, and nickname. The last name field must have from 1 to 30 alphabetical letters; the first name must have from 1 to 20 alphabetical letters; the nickname is an optional field that is usually used for offerings that will be issuing name tags and/or name "tents". The nickname may have from 1 to 16 alphabetical characters. The middle name may be blank or have from 1 to 20 alphabetical characters; and the suffix may either be blank or have from 1 to 6 letters. All letters in all fields are upper case, and there should be a space in last names in place of an apostrophe, such as "O LEARY" or "MC DONALD". All name fields are left justified. **If the name that is being created EXACTLY matches the last name, first name and first initial of the middle name AND matches either the date of birth or zip code of a record that is already on ISIS, a warning message should prompt the operator to check the situation on AMIA to help prevent a second student record for that student from being created on ISIS.**
**Former Name** - This field is system-generated and shows the previous name if this student had changed her/his name since it's creation in ISIS. The field is 41 bytes, and shows all of the former last name, a space, all of the first name, a space, and as much of the middle name and suffix as space will allow. Nicknames or names that had been previously entered incorrectly, and then corrected, will not show in this field. Only those legitimate name changes will appear.

**Last Update** - This is system generated and consists of two fields: the USERID of the last person to update the name, and the DATE that the update was made to any of the following fields: Student Name, Student ID, gender, ethnic, or date of birth fields. The USERID field is 8 bytes of alpha/numeric, and the date is 6 bytes shown as MM/DD/YY.

The name, gender, ethnic, and birth date fields may be created by any operator with "ADD" capability to ARUSNP, but may be changed only by a campus registrar using screen ARUSNR. Operators of ARUSNP may, however, make changes to the "Area of Interest", nickname, or work address fields, OR may enter any value that was previously left blank. **Home address changes can only be made using screen ARUSPA**

**Home Address** - This consists of eight fields that represent the home address and home telephone number of the student. Any operator with access/update capability to ARUSNP may create or change any of the address fields. **ST1** is 30 bytes alpha/numeric; is a required field; would hold specific information such as RR Number, Box Number, and/or Apartment Number, if they are part of the address, else the street number and name, such as 123 Elm St would be entered in this line. **ST2** is used to hold the street and number when **ST1** is used to hold more specific information such as RR#, Box #, and/or Apartment Number. **City** is 20 bytes alphabetical and holds the city name, such as Altoona. **State** is the 2 byte state code used by the U.S. Postal Service, such as "PA", or "MD". **ZIP** is either the 5 or 9 byte number used by the postal service. **Telephone** is the 10 byte number at the student's home. **Country** is generated by the system as "USA" if the student's address is in a state or territory of the United States. If the address is outside the United States, the country code is entered by the operator. If the country code is not known, the operator may put a "?" in the first byte of the country code and the country code table will appear in a window. The **county** code is generated by the system from the ZIP code.

The USERID and the DATE that any of the 8 fields of the home address was changed will appear on the screen after each home address update is made.

**Work Address** - has 13 separate fields which may be created or changed by the operator. Unless the operator happens to know the company code, the operator should tab to the **CO CODE** field and put a "?" in the first byte of the field, and 2, 3, 4, 5 or 6 letters of the company name in the next bytes. The system will return with a "pop-up" window that shows a "quick scan" screen (ARIKQ) of all of the companies in the system with those two to six digits as the first part of their company name. Other combinations of area code, county/state code or ZIP code will further define the company. If/when the company is found, the operator selects the number on that line of screen ARIKQ and presses ENTER which will bring the appropriate data from the company file over to the student file. Having returned to ARUSNP, the operator will check each of the work address fields for accuracy. If any of the fields are different, the operator would then change those as shown on the registration form. **Changes made on ARUSNP will not change any data on the company file.**

If the student's company is not on the company file, the operator should press ENTER to return to ARUSNP; press PF12 to update ARUSNP with the data that has already been entered; and then fast path to screen ARUKM and create the company on the Company File. When completed, the operator should path back to ARUSNP, put a "C" in the ACTN field, the student ID in the STUDENT ID field and enter the company code that was just created in the CO CODE field. Pressing ENTER will move the company data from the company record to the student record.
The operator then verifies and changes, if necessary, the address, the telephone number, telephone extension number, the FAX number, and the electronic mail address from the registration form. Name is the name of the company or organization who employs the student. It is a 30 byte field that can have either alphabetical or numeric characters. The address is composed of to street lines ST1 and ST2, each having 30 bytes which may be alphabetic or numeric. The city, state, country and the ZIP are created with the same specifications as the home address. The telephone is the regular 10-byte number to include a valid area code. The EXT is the 4-byte telephone extension; the FAX number is 10-byte numeric; the EMAIL field is 20 bytes alpha/numeric.

The USERID and the DATE that any of the 13 fields of work address was changed will appear on the screen after each update is made.

All values having been entered, and all edits performed and corrected, the operator presses PF12 to update the record. The system returns with the message "RECORD CREATED".

MAKING A CHANGE TO A STUDENT RECORD

To change a record, the operator will path to screen ARUSNP, and enter an "S" in the ACTN field, and the social security number in the STUDENT ID field, and press the ENTER key to "search" for the record. When the record is displayed, the operator enters a "C" in the ACTN field and proceeds to make the change. The operator is able to change the following fields: AREA OF INTEREST, NICKNAME, and WORK ADDRESS. Changes to the home address can only be made using screen ARUSPA. Changes of NAME, STUDENT ID, GENDER, ETHNIC, AND BIRTH DATE can only be made by the campus registrar. Operators are, however, able to enter any value on the screen using the change mode for fields that were previously blank.

Home address changes are made using screen ARUSPA, following all of the current procedures that are used when home addresses are changed for students who are enrolling in credit courses. This includes the feature of deleting the home address if it is determined that the home address of record is incomplete, and no new address is known. When the home address is "blanked" using the space bar, that address moves to the BILLING address location.

All values having been entered, and all edits performed, the operator presses PF12 to update the record. The system returns with the message "RECORD UPDATED".

CHANGING NAME, GENDER, ETHNIC BACKGROUND OR DATE OF BIRTH

Campus registrar's and registrar designates may change a student's name, gender, ethnic background or date of birth by using screen ARUSNR. Operators other than registrar's and registrar designates will not be permitted to update these fields due to the sensitivity of these elements and to better maintain the integrity of all student records.

Registrars will "skip" to student's record by entering an "S" in the ACTN field, and the number in the STUDENT ID field and pressing ENTER. When the record appears, and the registrar is satisfied that it is the appropriate record, she/he enters a "C" in the ACTN field and "TABs" to the field that is to be updated.

Documentation that is required to make an official change of name includes either: (1) an affidavit declaring that the name is being changed due to marriage; (2) an affidavit declaring that the name is being changed due to a divorce decree; or (3) a certified copy of a court order showing the new name. If the name is being changed to correct an error, or if the student wishes to have the name changed to a
"preferred" name, (Example is that the student would wish to have the name listed as "R. Thomas" rather than "Richard T.") the student is asked to show a driver's license, a checkbook, or other documentation showing that the student is using the "preferred" name. Before any part of a student name is updated, the operator will see a window which requires the operator to indicate the reason for the name change. The operator will indicate either "A" - Replace a name with a new name; "C" - Correct or enhance spelling of a name; "R" - Remove a name; or "X" - Exit with now action. The system then returns to ARUSNR with the value already recorded.

If the change is to the GENDER, ETHNIC BACKGROUND or BIRTH DATE, the registrar will use proper identification or reasonable judgment in deciding how she/he will arrive at the correct data to enter into the student file.

II. PROCEDURE TO MERGE TWO STUDENT RECORDS: SCREEN ARUSNX
Any user of ISIS may discover that a student has been created in the student file more than one time with different student numbers. When this is discovered, the person should present the information to the campus registrar, or the registrar designate at their offering unit. The information should include both social security numbers (or all of the numbers) that have been used to create the student records, and the necessary proof to show which number is correct.

The campus registrar will path to screen ARUSNX to make the correction. The registrar will enter an "S" in the ACTN field and the correct social security number in the top field labeled "CORRECT ID", and the incorrect number in the top field labeled "INCORRECT ID", and press the ENTER key. The system will return with the following data elements from each of the two records. Full name including Nickname; Date of Birth; gender; Former name; ethnic code; area of interest; home address and telephone number. If the registrar determines that indeed the student is in ISIS under both numbers, she/he will enter a "M" in the ACTN field ("M" stands for "Merge") and press PF12. This will create a record in the transaction log that will merge the two records at the close of business on that day. If there are three numbers (A, B, and C) for a student, and "A" is correct, the registrar may merge "B" to "A" on day one, and then merge "C" to "A" on day two. If there are different data in the respective fields, the data in the record listed as "CORRECT ID" will override the data in the record listed as INCORRECT ID. If no data exists in field with the "CORRECT ID" but data does exist in the same field with the INCORRECT ID, the blank field will not override. On the following day the former ID (INCORRECT ID) number will be displayed in the FORMER STUDENT ID field at the lower right of the screen.

III. PROCEDURE TO CHANGE A STUDENT'S NUMBER: screen ARUSNP
If an operator discovers that a student's number in ISIS is incorrect, that information should be reported to the campus registrar, along with appropriate documentation. The campus registrar will use screen ARUSPX to change the record from the incorrect number to the correct one.

The registrar will path to ARUSNX and enter an "S" in the ACTN field, the correct number in the CORRECT ID field, the incorrect number in the INCORRECT ID field and depress ENTER. The screen should return with the student demographics in the INCORRECT fields, and blanks in all of the fields in the CORRECT ID fields. Any data in the CORRECT ID fields represents an error condition. If the registrar determines that all conditions are appropriate, he/she enters a "C" in the ACTN field, and presses PF12. This will create a record in the transaction log that will change the number of the record at the close of business on that day. The following day, the INCORRECT ID will be displayed in the FORMER ID field at the lower right of the screen.

Any errors with student ID's other than those described in paragraphs II and III above cannot be resolved by the registrar, and must be sent to the ISIS database manager for resolution.
IV. CREATION OF ADDRESS LABELS FROM THE STUDENT FILE.

Offering units will want to send brochures and/or schedules of future course offerings to students who have either taken a previous course, or who have shown an interest in enrolling in a certain field of study. The fields used to hold the selection data in the student file is the Area of Interest, as explained below.

Labels may selected based on courses previously taken; semester enrolled; by provider code; home or work address of the student. Output will be alphabetical by ZIP Code on the standard four-across Cheshire format. Offering units can select to have the labels printed at an OAS printer or have the output directed to a CMS account. If the output will be printed on pressure-sensitive labels, specifications will be developed for ordering the appropriate label stock.

**Area of Interest** - These fields can hold one, two, three course abbreviations of previously taken courses, and/or one abbreviation of a course in which the student has indicated an interest. Also shown is the semester/year that the course was taken by the student, and the provider code of the offering unit that offered the course.

<table>
<thead>
<tr>
<th>AREA</th>
<th>SEM</th>
<th>PROV</th>
</tr>
</thead>
<tbody>
<tr>
<td>B LAW</td>
<td>FA93</td>
<td>DE</td>
</tr>
<tr>
<td>R EST</td>
<td>SU89</td>
<td>DE</td>
</tr>
<tr>
<td>R EST</td>
<td>FA88</td>
<td>OZ</td>
</tr>
<tr>
<td>ENGR</td>
<td>SU95</td>
<td>DE</td>
</tr>
</tbody>
</table>

To order mailing labels, an EMC2 Userform can be prepared that will allow offering units to select up to five separate course areas, or "ALL" students; select the "SEM" date, (which would allow selection of only the current students, if desired); and the users provider code. The Userform will also allow the selection of an OAS printer or a CMS account ID to allow the offering unit to select where the mailing labels will be printed. The job will be requested via MSCHED and will typically be run overnight at OAS.

It is assumed that a more sophisticated system to produce mailing labels for students will be forthcoming in a later release of NCRR.

V. VIEW ALL STUDENTS IN THE STUDENT FILE: Screen AMIA

A common file is used to hold all students who are prospective student, applicants or have enrolled for some form of coursework at Penn State. The file includes conferees, medical students, undergraduate, graduate degree students, non-degree students, management development students and students from a wide variety of certificate and informal programs offered at a campus or via Continuing and Distance Education. More than two million records exist on the file.

The primary purpose of screen AMIA is to find the student's ID number using a combination of the student's last, first and middle name. If more than one student has the same name, further information is available (gender, birth date, city state) on the screen to assist in making positive identification.
If an asterisk appears to the left of the name, it means that the student has changed his/her name at some previous date. To see the "former" name, the operator can look at the student's record on screen ARUSNP.

There are two columns that show student status. The first column is labeled "ST" to show the most recent student status as it pertains to courses enrolled for credit. The valid status's are "A" - Applicant; "P" - Prospect; "R" - Archived Applicant; and "S" - Student. The second student status column is labeled "NC" for non-credit, and has a status of "N" - Non-credit if the student has enrolled in a non-credit course at Penn State; or the field is blank if the student has not enrolled for a non-credit course.

**REGISTRATION**

**NON-CREDIT INDIVIDUAL REGISTRATION screen: ARURNI**

**Purpose:** This screen is used to register students; add, drop, or cancel courses; set additional charges; print student registration confirmation sheets; select course variables; select "individual" or "group" charges; select whether or not the student bill will be paid by a third party; and enter the company code of the third party payer. In addition, the operator will be able to validate the student's home and work address information, and "toggle" to screen ARUSNP, (the Maintain Student File) if a student create or update is needed, and "toggle" back when completed. And finally, the operator will be able to enter a student onto a "Waiting List" for a course section or for an course variable; and will be able to "override" the system and allow a student to be registered for a course even though the enrollment is equal to or greater than the class limit.

The course status of all students who register for, or add a course, will be REGIST. Students who register will be in REGIST status regardless of whether or not their course fee has been paid. Students who had been registered, but have dropped the course will have a course status of DROP. Students who had been registered and have been canceled by the administrator of the course will have a course status of CANADM. The only other valid course status is WAIT, which is the course status of a student who is on the waiting list for a course section.

In NCRR/ISIS, students do not have a status; only courses have a status.

Course offering units will have exclusive update capability of the courses within their unit, while other units may have inquiry capability for the screen. The screen will have two pages. The upper half of page one will show student data including home and work addresses of the student who is registering, and the lower half of the screen will show the current status of any courses for that student. No updates may be made on page one, as it is used to select the course that will be updated on page two of the screen. The second page has all of the update items relating to the registration and setting of all charges for the student.

**The Registration Form**

The student will have completed a registration form after reading and selecting the course or courses for which that student wishes to enroll. All student data necessary to create a complete student record on file 217 will have been supplied by the student, to include: name (last, first middle, and suffix are expected; nickname is optional), Student ID, gender, date of birth, ethnic background information, area of interest, home address and telephone, work address, and telephone. The student will select the schedule number for each course that he/she plans to register for, along with the course name, section number, course title, number of units, and the tuition amount of the course. If there are items associated with the course that have additional charges, those items will be listed, along with the cost...
of the additional item, and the method of payment. If the student is paying for the course as an "individual", the form is annotated with that information. If a third party is listed as the payer and the student has a letter or authorization from a company or sponsor, their name and address will be listed in an area called "Send bill to:". If the method of payment is the student's Mastercard or Visa, the card number and expiration date will also be listed. If the payment for the course is covered by the student's employer and the University has already signed a Memo of Agreement or Contract with the company or sponsor, the "group" method of payment should be listed on the form. Finally, if there are course variables that do not have additional charges associated with them, the student should list those in the area called "Course Variables".

**The Term Course Master (TCM)**
Each of the charges, including the course fee, and all of the additional charges and discounts will have been previously entered onto the TCM. Those charges cannot be changed if any students are registered for the course, however, new charges may be added after students are registered. All of the fees and charges have the full set of FANS codes to support the IBIS sub-system of AIS

**The Detailed Create/Verification Process**
The operator will path to ARURNI and enter the Student ID of the student who is about to be registered, and the semester/year of the course, and press ENTER.

*If the student has a record on ISIS*, the first 25 bytes of the student's last, first, middle, suffix and nickname will be shown in that order, with each field divided by a comma. If the full name has more than 25 bytes, those bytes over 25 will not be displayed, but can be verified if the operator "toggles" to screen ARUSNP. "Toggle" means that by pressing PF9, screen ARUSNP will be displayed and will allow the operator to update the student file with either student or address information. Also displayed will be the student's AREA OF INTEREST; the HOLD indicator, (which if shown as "Y" means that the student has a hold on his/her record, likely due to an outstanding financial obligation); HC which stands for "Hard Copy", (if the operator changes the indicator from "N" to a "Y", a registration confirmation will be printed when the operator presses PF12); and PRINTER which represents the specific printer where the confirmation would be printed.

*If the student is not already on ISIS*, the operator "toggles" to ARUSNP and creates the student record and all of the home and work address information to include the name of the company where the student is employed. If the company IS on the company file, the operator will bring that data from the company file to the student file by entering the company code. Corrections to phone number, etc. then can be made to the student's record (see page 3.1 for more information regarding the creating of a student record). If the company where the student works is NOT on the company file, the operator will press PF12 to update the student file with all of the data that has been entered to this point. Having done that, the operator will fast path to screen ARUKM (Maintain Company/Sponsor screen) to create the company in the company file (see page 6.1 for more information regarding the creating of a company record). The operator will now fast path back to screen ARUSNP and enter or amend the rest of the data required for the student record and press PF12. Pressing PF9 (the "toggle") will now return the operator to the registration screen (ARURNI).

**Registering a Student**
After the student record is created, (or verified and updated) the operator is ready to register the student for the course or courses that are desired. The cursor will be on the ACT (action) field of the first of up to six lines which will display courses that the student is (or was) registered for during the given semester. If the student has no courses for the semester, all of the course lines will be void of data. If the student has six or more courses with activity during the given semester, a "Y" will appear in the "MORE" field. Courses 7 through 12 may be viewed if the operator presses PF8.
One of four actions may be done from page one of ARUSNI. An operator may add a course, drop a course, cancel a course, or skip to (search) a course that was already previously entered on the system. In each case, when entered, the system will return with a display of page two of ARURNI, showing the detail of the course requested.

If an add of a course is required, the operator will enter an "A" in the ACT field and the Schedule Number in the SCH NO field in the first blank course line, and will press ENTER. The screen that returns will be page 2 of ARURNI which will display ACT, SCH NO, STATUS, COURSE, SECT, PROV/LOC, UNIT, WAIT, and OVR from page one unless the schedule number is invalid, in which case the cursor will remain on page one. If the student is paying the course fee, the operator will check to make sure there is an "I" in the INDIV OR GROUP CHARGE field. The other value that could be entered is "G" if the course fee is being paid by a company or sponsor. If a "G" is entered in the INDIV or GROUP CHARGE field, there must have been a contract or memo of agreement in the company file for the course, and there may not be any ADDL CHARGES OR DISCOUNTS for the course. If "I" was chosen and no additional charges or discounts or course variables are to be entered, pressing PF12 will update the record, register the student, and return the operator to page one of screen ARURNI with the cursor resting on the first position of the Student ID field. Page one will now show the course just added in the first course line with REGIST in the STATUS field.

If a student presents a letter of authorization from his/her employer or other sponsor, indicating their intent to pay the course fee, the operator will enter a "Y" indicator in the AUTHORIZED LETTER? field, and the nine byte company code in the COMPANY CODE field. The charge will then be set on the company account rather than on the student's account when PF12 is pressed, and the record is updated.

Only one add (or drop) can be entered at a time. If an action code is entered on more than one course line, an error message will appear when ENTER is pressed, informing the operator that no more than one action can be applied at one time.

There are three conditions that may exist where a registration should not be permitted: (1) the college dean has placed a "LOCK" on the section by entering a "Y" indicator in the "LOCKED" field on screen ARUCNL; (2) the financial person from the offering unit has not set the REGISTRATION INDICATOR to "Y" on screen ABTN; or (3) the EST ENRL indicator on screen ARUCNT has been set to "Y" by the registration person at the offering unit. In each case, an appropriate error message should be displayed at the bottom of the screen giving the operator notification of the error.

ENTERING 'ADDITIONAL CHARGES' - Page two of ARURNI allows the operator to add codes for additional items and their associated charges, and will allow the operator to enter a student on a waiting list for the additional charge, if the student is already enrolled or on the waiting list for enrollment in the course. There are three valid codes that may be entered in the ACT field, and three status's that will appear as a result of the action code being entered.

<table>
<thead>
<tr>
<th>ACT code</th>
<th>STATUS code</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>D</td>
<td>DROP</td>
</tr>
<tr>
<td>W</td>
<td>WAIT</td>
</tr>
</tbody>
</table>

The operator may add an "additional charge" item by entering an "A" in the ACT field, the quantity of additional items requested in the QUAN field (system will default to '01' in the QUAN field), and the five-byte code representing the item that is being added in the CODE field. Only items that had previously been entered onto the TCM for the section may be entered. Once entered, the status of the transaction is "ACTIVE".
Up to 24 separate actions (adds, drop, wait) may be entered for each student in each course. If there would be more than 24 items, they will have to be entered directly onto the student's account. If a charge is ACTIVE, and the operator wants to drop the charge, she/he enters a "D" in the ACT field of that charge line, and presses PF12. The status of the charge that was dropped will change to DROP. The system will record the date of the transaction, and will cancel the charge that was set when the action was first entered. If that charge is entered for the second time, the DROP entry will remain, and a new charge line will be made by entering an ACT of "A", the valid code in the CODE field, and the quantity in the QUAN field. When the operator presses PF12, the system will return with "Active" in the STATUS field, and the cursor will return to page one on the first position of the Student ID field.

If the operator would like to place the student on a waiting list for an ADDL CHARGE, she/he enters a "W" in the ACT field, the code in the CODE field and the number of items in the QUAN field. Pressing PF12 will update the record, write "WAIT" in the STATUS field, and return the operator to page one of ARURNI with the cursor on the first position of the Student ID field.

From one to four COURSE VARIABLES as defined on the TCM for the course, may be added in a similar manner as ADDL CHARGES AND DISCOUNTS, except that all that is required is the 5 byte code be entered in the COURSE VARIABLES field. Only course variables that had been previously entered onto the TCM for the section may be entered. Pressing PF12 will update the record and return the operator to page one of ARURNI with the cursor on the first position of the Student ID field.

If the course section is offered as a variable unit course (the TCM has a UNIT MIN and UNIT MAX values that are different), the system will prompt the operator to enter the intended value in the UNIT field of page two of screen ARURNI. As long as the unit value is equal to or within the minimum and maximum values, it is acceptable. Any adjustments to the course fee will be entered as an ADDL CHARGE or DISCOUNT. If the minimum and maximum unit value are the same value on the TCM, the operator will not be able to make any changes to the unit value.

If the number of enrolled students is equal to or greater than the class limit, a warning message will appear at the bottom of page 2 of ARURNI screen if an add is requested (PF12 is pressed). The option will exist to either put the student on the "Waiting List" for the course, or to over-ride the edit and register the student even though the limit has been equaled. If the student is to be entered on the waiting list, the operator enters a "Y" in the WAIT field and presses PF12. The cursor will return to page one on the first byte of the Student ID field. Page one will now show that course line with WAIT in the STATUS field. All charges for a student in WAIT status should be set as though the student were entered with the REGIST status. Students in "WAIT" status are not considered as enrolled students and are not counted in the ENRL CNT (enrollment count) on the TCM. A student CAN be placed into the WAIT status whether or not the class is filled.

If the operator wants to register the student even though the class is full, the operator enters a "Y" in the OVR field on page 2 of ARURNI and presses PF12. The student is moved into REGIST status, and the cursor will return to page one on the first position of the Student ID field.

If a drop of an existing course on page one of ARURNI is required, the operator enters a "D" in the ACT field on page one, adjacent to the course that is to be dropped, and presses ENTER. Page 2 of ARURNI will then appear with the course line at the top. The "D" code will be entered by the system for each Additional Charge and Discount that may be shown on one of the 24 lines. If the operator determines that one or more of the additional charges should remain even though the course is being dropped, the operator should remove the "D" from the appropriate "additional charge" line. The operator now presses PF12 and the system annotates the student's course record with the status of "DROP".
If the quantity of the additional charges or discounts is changed from one to another, the "old" charge line will be listed with "DROP" in the STATUS line when PF12 is pressed, and the appropriate quantity will be added to a new line with "ACTIVE" in the STATUS field.

If the drop of the course occurs before the forfeit date, all charges are canceled except for any additional charges for which the "D" was removed from the ACT field.

If the drop occurs on the first day of class or later, all charges remain. The course that was just dropped will appear on page one in the course line with DROP in the STATUS field, and the cursor will return to the first position of the Student ID field on page one.

If it is determined that a cancellation of an existing course is appropriate, the operator enters a "C" in the ACT field on page one of ARURNI in the ACT field of the course that is to be canceled, and presses ENTER. Page 2 of ARURNI will appear with the course line at the top. The "C" code will be entered by the system for each Additional Charge and Discount that may be shown on one of the 24 lines. If the operator determines that one or more of the additional charges should remain, the operator will remove the "C" from the appropriate charge line, and press PF12. The course and all of the charges with a "C" are canceled regardless of whether the class has started or not. The course that was just canceled will appear on page one in the course line with CANADM (cancel administrative) in the STATUS field, and the cursor will be returned to the first position of the Student ID field.

If the operator would like to search the detail of a course that is listed on a course line on page one of ARURNI, he/she enters the code "S" in the ACT field, and presses ENTER. Page 2 will appear with the course line at the top, and all of the variables that may have been entered will be displayed. The STATUS field in the ADDL CHARGES OR DISCOUNTS columns will read either ACTIVE, CANCLD, DROP or WAIT for all charges/discounts that have previously been entered. ACTIVE means that the charge was made to the student's account. CANCLD means that a charge was made to the student's account, but was later canceled. WAIT means that the student is on a waiting list for the particular item that is listed. No updates can be made when the operator uses the "S" action.

If an add, drop, cancellation or search of a record is requested, AND the student has had a "hold" placed on his/her record using screen ARUSHC(F)(R), a WARNING message will appear at the bottom of the screen informing the operator of the "hold" situation.

NON-CREDIT SECTION WAITING LIST: Screen ARURNW

**Purpose:** This screen is used to view students from a specific section that had previously been entered onto the waiting list for the section; to change students from a course status of WAIT to the course status of REGIST; and/or to change a student a course status of WAIT to CANCLD.

The operator will fast path to ARURNW, and enter the SEM, COURSE, SECT, PROV/LOC and DEL and press ENTER. Those fields will be displayed along with the first 30 characters of the abbreviated course title, and the first two lines of the instructor field from the TCM, and the ENRL MAX and the ENRL CNT in the header area of the screen.

The body of the screen will display the selection (SEL) field, the student's name, Student ID, gender, work phone (including extension), home telephone, and the date that the student was entered into ISIS in WAIT status. The student who was the first entry (earliest date and time entered) onto the waiting list will be shown at the top of the screen, with later entries recorded chronologically. The operator
may move one or more of the students from WAIT status to REGIST status by entering the code "R" (register) in the SEL field for each student that is to be moved into REGIST status, and pressing PF12. No charges are set when the student is moved from WAIT status into REGIST status, because the charges would have already been set when the student was put on the waiting list.

The operator may move one or more of the students from WAIT status to CANCLD status by entering the code "C" (cancel) in the SEL field for each student that is to be canceled. This action **WILL** cancel the changes that had already been set when the student was entered on the waiting list for the course.

A student **can** be moved into REGIST status whether or not the ENRL MAX is equal to the ENR CNT (class filled). If a change to REGIST status is attempted and there are not available spaces in the class, a "Warning Message" will appear when PF12 is pressed, telling the operator that the class is filled, and that pressing PF12 again will update the record even though the class limit has already been met. This has the effect of performing an override to the system.

If a student is in WAIT status, and today's date is class day one or later for a section of a course, a message appears on the Weekly Registrar Exception Report when it runs on the weekend that will allow the campus registrar or registrar designee to resolve the situation. The registrar would either change the student to REGIST status, or cancel the student using screen ARURÑI, (which would cancel the charges) whichever is appropriate.
NON-CREDIT ON-LINE CLASS LIST Screen: ARICNC

Purpose- This screen is used to display all of the students of a given section electronically. Students already enrolled in the section will be listed in one alphabetical group, and students on the waiting list for the section will be shown on a second alphabetical list that follows.

The operator will path to ARICNC and enter the Course Key (semester, course name and number, prov/loc, and delivery) for the course that will be displayed, and press ENTER. The course key, plus the Abbreviated Title, and the Instructor(s) will be displayed at the top of the page. The name, ID, gender, units, work and home telephone numbers will be displayed for all students in the section. The first 15 names will appear on page one, and additional pages may be seen by pressing ENTER or PF8 until all names have been displayed.

If the operator would like to produce a printed roster of the class, he/she should press PF9. The system will "toggle" to screen ARICNP and permit the operator to request the desired class roster.

HOLD REQUEST AND RELEASE Screen: ARUSHC

Purpose- Each offering unit will have the need to place registration or transcript "holds" on the record of a student who has an outstanding financial obligation, or for other appropriate reasons. Screen ARUSHC exists in the current ISIS system, and is used to place and release holds on students who are taking credit courses. That ability will be extended to allow holds to be placed on all students to include those who enroll for non-credit courses.

Screens ARUSHC, ARUSHF and ARUSHR are used to initiate "holds" on student transactions and activities and to release those holds when the student has satisfied the obligation that caused the hold to be initiated. ARUSHC, ARUSHF and ARUSHR are identical screens. ARUSHC is used by the campus registrars, and colleges; ARUSHF by the University Bursar, and ARUSHR by the University Registrar.

After a "hold" has been placed on the record of a student, a warning message will appear on screens ARURNI, ABAA, ABRN, ARURG, and/or ARIRS that will state that the student has a hold from a previous obligation, and that registration and/or production of a transcript may not be accomplished until the obligation is fulfilled.

Screen ARUSHC is location-specific in the credit world in that a hold placed on a student who is at the time located at campus "A", cannot be released by any other campus. The originating campus is determined by the USERID of the person who places the hold. That same process will be followed when dealing with a student who is taking a non-credit course, even though students in the non-credit world do not "belong" to a campus. All other aspects of the use of the three screens is identical to those currently used in ISIS for credit students.
STUDENT COURSE STATUS INQUIRY Screen: ARIRS

Purpose - This screen currently exists in ISIS for credit students and is used extensively throughout the system to view the course status of students. It shows the current and up to two previous status's of each course that a student may have been enrolled in during the semester/session. In the integrated credit/non-credit ISIS system, all courses, credit and non-credit will be shown. There will be a clear distinction between those courses that are credit and those that are non-credit.

The operator paths to screen ARIRS, and enters the Student ID and the 4 byte semester/year and presses ENTER. The screen appears with those fields being displayed along with the first 12 bytes of the name. If the student is a credit enrollee, the major, dept., college, semester classification, location, student status, and a "Y" indicator will be shown if the student has filed an estimated bill as of the date. If the student has only enrolled for a non-credit course, only the name, Student ID and Semester date will appear.

If the student has both credit and non-credit courses in the same semester, the screen will show the credit courses first, followed by the message line ****************NON-CREDIT COURSE(S) FOLLOW****************. If all of the student's courses are non-credit, the message line will appear first. If all of the courses are credit, only the credit course lines will appear.

PRINT NON-CREDIT CLASS ROSTER Screen: ARICNP

Purpose - Offering Units will use this screen to request the printing of various types of class rosters (class lists) according to their needs. Types of rosters that have been identified so far include: (1) class roster, which shows home and work telephone numbers; (2) roster with individual fees paid by each enrollee; (3) a roster listing students on a waiting list for items with additional charges or selected course variables; (4) a roster with student's home address; (5) roster with student's work address; (6) roster of employees from a company that has contracted for an offering; and (7) a grade roster, to initiate the grading process for those courses that have grades. Any of these seven rosters can be ordered and printed by selecting the appropriate roster from the ARICNP screen and having the roster printed at the offering unit's local printer. Only one roster can be printed with each request. Only students with courses in REGIST status will appear on the roster (except roster #3, which lists only students in WAIT status).

The operator will path to screen ARICNP, and enter the SEM, COURSE, SECT, PROV/LOC and DEL for the course/section that she/he wants to display, and press the ENTER key. Those fields will be displayed along with the number of the printer associated with the USERID of the operator. The operator has the option of changing the printer ID. The instruction to the operator is to enter an "X" beside the desired roster. In addition, the roster that shows additional charges and course variables, will also require that the abbreviation of the item be entered. If more than one selection is made, the system will return with an error message.

All class rosters will have the following information in the header of the printed page: "The Pennsylvania State University"; the location of the course; the name of the type of roster; the course title; the beginning and ending dates of the course; the instructor(s) name(s); the semester; the schedule number; the course name, number and section; and the time and place of meeting. The Class Roster By Company will also have the name of the company listed. The Class Roster With Fees will show an
asterisk to the right of the TOTAL fees for any student who has 7 or more additional charges. The NET CHARGES will show the correct amount, even though, in this case, all of the individual charges cannot be shown. All rosters will be sorted in alphabetical order by the student's last name. The grade roster is defined in the specifications for Chunk #5.

REPORTS

Four reports have been identified for release one of the NCRR Project: a confirmation of registration; an enrollment report; an open/closed section count; and a registration exception report. Others will be identified for release later. Three of these reports will be requested for overnight production, and one ("Registration Confirmation") may be requested from the on-line system.

REGISTRATION CONFIRMATION - This is a printed confirmation of the fact that a student has had a registration recorded in ISIS and may be requested by the operator when using screen ARURNI. The schedule will show the student's name, address, the course, the time of place of course meeting. An acknowledgment of any additional charge items or course variables that the student has chosen will be shown by listing the 13 byte abbreviated title for the item; the number of items; and the charge for the item(s). It is expected that these confirmations will be given to students who register in person, or may be sent to the student as a confirmation that a registration that was sent through the mail has been received, and that the course variables and additional charge items that may have been chosen, have been accurately recorded.

ENROLLMENT REPORTING- While all of the enrollment reports that will be forthcoming from the data collected in the Non-credit registration process have yet to be defined, there are at least two different reports that will be needed in Release #1. A global report that will count course enrollments by delivery, and a student count by delivery may be requested. These reports will be available by request of OAS on an over-night basis. (Course enrollment reports by offering unit and by college have been defined earlier in Chunk #2).

The requester of the global reports will have the option of requesting enrollments by either semester or "year-to-date". In either case, both the credit and non-credit enrollments (or students) will be in the counts.

The COURSE ENROLLMENT COUNT BY DELIVERY SYSTEM shows a total count of all course enrollments by the various delivery systems. The STUDENT COUNT BY DELIVERY SYSTEM shows one for each student in each cell of the report. The TOTAL fields (both column and row) have duplicates removed from the count so that the total number of students may be determined for each delivery system and for credit and non-credit students. The TOTAL/TOTAL counts each student only once regardless of whether the student took credit, non-credit or courses via two or more delivery systems. In addition, a data file may be downloaded from ISIS that may be used by the offering unit to customize their report.

NON-CREDIT OPEN/CLOSED REPORT - This is a printed report that shows one line for each section at an offering unit and is sorted by the starting date of the course. The following data elements appear for each section: Course name, course section, number of units, the first 26 bytes of the abbreviated course title, class limit, class size, remaining seats, meeting days, time and room, instructor's name, and the ending date of the course. If there were no remaining seats in the class at the time that the report was printed, the word "closed" will appear in the "remaining seats" field. The data to be selected for printing will be controlled by either choosing a semester/year, or by selecting a range of dates, in which case all sections within the date range would be printed even though some sections may be in one semester/session, and some in another. In addition, a diskette may be downloaded from ISIS that could be used by the offering unit to customize their report.
NON-CREDIT REGISTRATION EXCEPTION REPORT - A weekly report that will list all registration/drop/add or cancellation transactions that were entered during the previous week that were 60 or more days beyond the ending date of the course. The report will show the student name and Student ID, the course key (course, section, semester, prov/loc, del) and status of the course before and after the transaction was accomplished, along with the USERID of the person who updated the transaction, and the date. The report will be sorted by offering unit and is intended to be reviewed by the campus registrar or registrar designee of each offering unit. A second table of the report will show students who remain on a waiting list for either a course or for an ADDL CHARGE OR DISCOUNT or COURSE VARIABLE even though the course has begun. A summary report showing all transactions COULD be made available to the University Bursar and/or the University Registrar upon request.

GRADE REPORTING/TRANSCRIPTS

GRADE REPORTING AND TRANSCRIPT PROCESSES

Grade roster preparation - The campus registrar, or registrar designee will determine that all of the registrations have been entered for a given course, and will prepare the grade roster for the instructor by pathing to screen ARICNP, the PRINT NON-CREDIT CLASS ROSTER screen, entering the course key, entering an "X" beside the "Grade Roster" field and pressing PF11. One of two different types of rosters will be printed, according to the type of grade option that has been set on the TCM. Either roster will show the name and Student ID of the students in alphabetical order by last name, and the grades/symbols that may be issued to the student. If the "quality" grade option has been designated on the TCM, the following grades will be displayed on the line to the right of the Student ID: A, A-, B+, B, B-, C+, C, D, F, and X. The instructor will be asked to circle the appropriate grade/symbol. If the "participation" symbol has been designated on the TCM, either an "S" for "Satisfactory Participation", or "X" for "No quality grade reported" will be listed to the right of the Student ID for the instructor to circle. Grade rosters for courses that are not approved for either the quality or participation grade options have no purpose, and therefore cannot be printed using screen ARICNP.

Each time a grade roster is printed, a document number will be drawn from a code file and printed on the grade roster. The number will be sequential, and will start at 00001. The number will be incremented by one each time a new roster is printed. If a given class has three pages, for instance, each page will have the same number. When the number reaches 99999, the number assigned to the next roster that is printed will be 00001. The document number will be stored in the TCM record for the course section. At the end of the last page of the roster, a message will be printed indicating the number of pages of the particular roster.

A grade roster may be printed more than once, even if students are added to the section after the first roster is printed. Any students that are added after the first printing will be shown at the bottom of the roster in a separate alphabetical listing, and will have the appropriate grades or symbols to the right of the Student ID, so the instructor may circle the grade. Students who were dropped or canceled from the section on class day one or later, will appear on the first alphabetical list and will have the word DROP or CANCLD to the right of the Student ID instead of the grades or symbols to circle. Students dropped or canceled before class day one will not appear on the list. At the time of the first printing, the system will record the date of printing, and will "freeze" those students as the first alphabetical list. The document number assigned by the system will be the same number on the second and any
subsequent printings as assigned when the first roster for that section was printed. The grade entry screen (ARUCNG) will be in the same order as the last grade roster that was printed.

If a student and an instructor agree that it is appropriate for the student to participate in a course that is graded with "quality" grades, and it is the desire of the student to "audit" the course, the instructor will circle the "X" grade/symbol as an indication that no quality grade was awarded.

There will be spaces at the bottom of the last page of the grade roster for the instructor to sign and date the grade roster.

**Grade entry** - A screen will be available to allow the campus registrar or registrar designee to enter grades for non-credit courses via an on-line screen (ARUCNG - NON-CREDIT GRADE ENTRY screen). There will not be a grade scan sheet or a grade scan process for non-credit courses. The grade roster will be produced as described above using ARICNP. At the same time, the electronic version of the same grade roster will be created on ARUCNG, and will immediately be available to enter grades as soon as it is created.

The ARUCNG screen will show the students in alphabetical order by last name, and the student's SSN and gender. To the right of the name and ID, a two-byte space will be available to allow the registrar to enter the appropriate grade. Courses that have the quality grading option, may be graded with a quality grade of A, A-, B+, B, B-, C+, C, D, F, or the symbol "X". Courses that have been previously designated to receive a "participation" grade may be graded with an "S" or an "X" symbol. Grades with only one digit will be entered in the first of the two spaces allowed for the grade. Those courses that have previously been designated as having no grade or symbol, will not display on ARUCNG. The USERID and the date that the grade was entered or changed will be system-generated and appear to the right of the grade beside each student. An asterisk (*) will appear beside the grade field for a grade that has previously been moved to the transcript file by virtue of a grade reporting batch job. Grades with an asterisk will not be able to be altered in any way by the operator of ARUCNG.

A provision will exist to allow the operator to enter a "common" grade for all or most of the student's in the section, without having to individually enter all of the grades. In those cases where most of the grades are one value (such as "S"), the operator may enter the exceptions, then enter the common grade in the heading, press ENTER or PF12, and have the system insert that grade for all students except those that had already been entered. As grades are being entered, the operator may press ENTER at any time to see if all grades entered to that point have been entered correctly. When the operator is satisfied that all grades are correct, she/he will press PF12 to record the grades into the enrollment file. Grades that are unavailable at the time of the first update may be entered later by the same process for 60 days beyond the ending date of the course.

When the grades have been entered, the registrar of the offering unit will send the grade rosters to the University Registrar for final disposition. The rosters will be hand sorted by semester/year and then by document number. The forms will then be microfilmed, and after verification, the paper forms will be properly destroyed. Retrieval of a image of the original document may be accomplished by finding the document number which is stored on the TCM, and then looking through the microfilm for the number and the student on the grade roster. Copies of grade changes and grades entered late will be kept separately by the University Registrar, by microfilming the Grade Change Authorization Form.

**Grade Reporting** - Each weekend, a grade reporting run will be made that will move the grades from the enrollment file to the transcript file, and will produce an individual grade report for those students who have received quality grades since the last grade run. Course enrollments that are ungraded in ARUCNG will remain on the enrollment file for at least 60 days, at which time they will be moved to the transcript file on the following grade report run with a grade symbol of "X" representing the fact that no quality grade was reported. Courses with participation grades will not be included on the
individual grade reports, but will be moved to the transcript file on the first grade run after being graded. Those courses that are designated on the TCM to have no grades awarded will have the symbol "EN" entered in the grade field and will be moved to the transcript file on the first grade run following the ending date of the course. The grade reports will be laser printed, enclosed in a self mailer, and mailed from the University Registrar each week.

Any changes to the transcript file (changes after grade reporting for that course for that student) can only be made by the University Registrar using screen ARUSNA - NON-CREDIT TRANSCRIPT FILE UPDATE.

Grades for "quality" or "participation" courses that are unreported after 30 days from the ending date of the course, will appear on the Registrar Weekly Exception Report that is run each week-end. This gives the offering unit an additional 30 days to enter the appropriate grade before the system "plugs" in an "X" grade/symbol.

Students enrolled in classes who officially drop the course on class day one or later, will have a symbol of "W" inserted by the system. Students taking classes that require a "quality" grade will receive a grade report showing the "W" symbol. A student whose course is administratively canceled while on the enrollment file will not receive a grade report; will not be moved to the transcript file; nor will an entry be made on the permanent transcript.

If two or more class grades are entered for a student during the same week (and is in the same grade run), both(all) courses will appear on the single grade report that is sent to the student.

After grade reporting for a student has occurred, and the graded course has been moved to the transcript file, grade changes can be made only by the University Registrar on screen ARUSNA - NON-CREDIT TRANSCRIPT FILE UPDATE. The University Registrar will send an unofficial copy of the student's transcript to the student's home address as notification of the grade change.

No grade reports will ever be generated that will show the grade field as blank or "NG".

Transcript Maintenance - The University Registrar will have exclusive update of the transcript file using screen ARUSNA - the NON-CREDIT TRANSCRIPT FILE UPDATE screen. It will allow courses given prior to SU95 to be added to the transcript file, and will allow grades to be changed from one grade to another after grade reporting for a given student's course has occurred.

Each course in the file is identified by the student's social security number and semester/year that the course was offered. A course may have one of three status': REGIST (enrolled for the course), DROP (was enrolled but dropped the course), or CANCLD (was enrolled, but was administratively canceled from the course). Courses with the status of REGIST may have a grade of A, A-, B+, B, B-, C+, C, D, F, S, or X. Courses with a status of DROP will have a grade/symbol of W. Courses with a status of CANCLD will not appear on the printed transcript but will have the symbol "CN" in the grade field of the transcript file. Canceled courses will only appear on the transcript file if the course registration is canceled after a grade had previously been entered via the grade reporting process.

Course enrollments that occur from SU95 and forward, may be added using ARURNI - The INDIVIDUAL NON-CREDIT REGISTRATION screen, until the enrollment file for that semester is archived. This will allow the system to set the charges and fees at the rates shown on the TCM, even though the course may be in session or may be completed. After the enrollment file is archived (at the end of the following semester/session) all late entries for that semester must be added using ARUSNA. It is the responsibility of the offering unit to make sure that the course fees and charges have been met for all late entries. Late entries will be entered by the University Registrar upon appropriate notification from the offering unit. Except for those courses that are already on ISIS by virtue of
upload from ACCESS, or loaded from the C.E.U. Transcript file in OAS, courses offered in SP95 and earlier may only be entered using ARUSNA (Students cannot be registered using ARURNI screen retroactive to SU95).

Certificate Information - College dean's offices will enter information into the "Special Actions and Notes" area of the Non-Credit Transcript when students have completed a certificate or diploma program. These programs will be detailed in Release #2 of the project when the specifications for Chunk #7 (Certificates and Programs) are developed. In the meantime, the colleges will be able to enter the certificate information and the date of the award into ISIS using ARUSNC, the NON-CREDIT CERTIFICATE UPDATE screen.

When the student has completed a program, (one or more courses in a series that when successfully completed equates to a significant point of development in a certain field) the offering unit sends a "Certificate Request Form" to the University Registrar requesting that a transcript of the students work be prepared and forwarded to the appropriate college. Upon receipt, the college will verify that the courses in the program have been successfully completed. If appropriate, the college operator will enter the certificate information using screen ARUSNC, by entering the code for the program in the CODE field and the date of the award in the DATE field. The "Certificate Description" will then be entered by the system onto the student's transcript in the SPECIAL ACTIONS AND NOTES area near the bottom of the transcript.

A report showing the number of certificates that are awarded by college and program will be prepared showing the totals for each semester or fiscal year.

Special notes and/or comments may also be added to the "Special Actions and Notes" area of the student transcript by the University Registrar using screen ARUSNM. This "Notes" area of the transcript will also show notations regarding alternate forms of Educational Value Measurement if the number of units shown in the "Number of Units" column is other than Continuing Education Units (C.E.U.'s).

Grade Changes - Changes to the Transcript File may only be made by the University Registrar using ARUSNA. Any grade that is still on the Enrollment File may be changed by the campus registrar using screen ARUCNG to correct erroneous entries at any time up until the time when the grade is moved to the transcript file (usually up to one week). For grade changes made after grade reporting, the official grade change process for non-credit courses will be the same as with credit courses, to include using the same Grade Change Authorization form. The instructor's signature and new grade is required, along with the signature of the Director of Academic Affairs or his/her designate. The completed form is sent from the campus registrar or registrar designee to the University Registrar for update of the transcript file, and permanent retention.

Transcript Production - Two reports that may be written from the transcript file are the official transcript, (exclusively by the University Registrar); and the unofficial transcript, (by offering units, colleges and other users who have report capability). Any operator with appropriate screen security may path to screen ARISTU - UNOFFICIAL TRANSCRIPT REQUEST screen, and view the types of transcripts that may exist for the given student. Any of four transcripts may exist: undergraduate credit; graduate credit; medical; and non-credit. After the operator looks at ARISTU and decides which transcript is desired, he/she selects the one to be printed and presses PF11.

Final Grade Audit - A report, intended to give the course instructor the final grade disposition of students in courses that receive quality grades, will be produced and distributed to the campus registrar or registrar designee on the next grade report run following the date when 60 days have elapsed since the ending date of the course. The report will show the student's name, student ID, gender, and the grade that is recorded on the transcript file, to include "X" symbols that were assigned as a result of no grade being reported. Two copies of the report will be produced: one for the instructor, and one for the
campus registrar or registrar designee. If the instructor determines that a grade is recorded incorrectly, the grade may only be changed using the current Grade Change Authorization form and procedures.

**PRINT NON-CREDIT CLASS ROSTER: Screen ARICNP**

When the registrar of the offering unit has all of the students registered, and decides it is time to produce the grade roster for a given section, he/she paths to screen ARICNP, enters the course key (SEM, COURSE, SECT, PROV/LOC and DEL) for the section that is to be graded. The operator then moves the cursor to the field to the left of the GRADE ROSTER field, enters an "X", and presses PF11. The system will print a grade roster at the printer number shown on the screen to the right of the course key. Normally the printer ID is that of the operator, but, if desired for some reason, the operator may route the grade roster to another printer by changing the printer number in the PRINTER field.

A document number will be assigned to each grade roster when a print is requested for a given section for the first time. The number is assigned by the system, stored in the TCM record, and appears on each sheet of the grade roster. Each page of a multiple page roster will have a page number that is 001 through 999. Each page will list up to 30 students, which is the equivalent of two screens, since only 15 names may appear on each screen. The document number will be sequential, and will start at 00001. The number will be incremented by one each time a new section is printed. If a given roster has three pages, for instance, each page will have the same document number, but will be uniquely identified by the page number. When the document number reaches 99999, the number assigned to the next roster that is printed will be 00001.

Following the last student name on the last page of the roster will be two separate lines: one for the instructor's signature, and one for the instructor to enter the date that the form was signed. Following those lines will be a system-generated message listing the number of pages of the roster.

**NON-CREDIT GRADE ENTRY: Screen ARUCNG**

When an instructor has returned a graded grade roster to the campus registrar or registrar designee, she/he will path to screen ARUCNG on ISIS and enter the course key, and press ENTER. The screen will appear with the course key, abbreviated title, instructor(s), date and time displayed in the header of the screen. Also displayed in the body of the screen will be the names of the students in the section (last, first, MI) in alphabetical order, along with their student ID, gender, a two byte space for the grade to be entered, and the USERID and date in the LAST UPDATE for each student, if previous grades had already been entered. If a given student's grade has already been grade reported and moved to the transcript file, an asterisk will also appear to the right of that student's grade indicating that the grade cannot be changed by the operator. Grade changes after grade reporting can only be made by the University Registrar.

The only fields that can be updated on the screen are the grade fields. The grade field is two bytes, and left justified for those grades that have only one byte. If the course section is designated as a "quality" graded course, the only grades that can be entered are A, A-, B+, B, B-, C+, C, D, F, or X. If the course is designated as a "participation" course, the only grade/symbols that are acceptable are S or X. Course sections that do not require a grade or symbol, according to provisions set by the colleges on the UCM, will not appear on screen ARUCNG.

If the majority of the students in the section have received the same grade, such as a course that is graded with an "S" or "X", the operator can enter an "S" in the COMMON GRADE field, and when ENTER or PF12 is pressed, that common grade will be inserted into the grade field of all students who
have no grade entered to that point. If all but one or two grades are "S", the operator can enter the "non-S" grades first and then enter the "S" in the common grade field; or the "S" may be entered in the COMMON GRADE field first and the "non-S" grades changed later. Changes to the grades may occur to correct improperly entered grades until the next grade report run is made.

The order of students that appear on screen ARUCNG will be the same as the last grade roster that was printed for the course section. Students that may have been added to the course section after the printing of the first grade roster, will appear at the bottom of the screen as a separate alphabetical listing. Students that were registered for the course, but were either dropped or canceled from the section after the first day of classes, will be listed on screen ARUCNG but the symbol of "W" will appear in the grade field for students that were dropped from the class on class day one or later; and the symbol of "CN" will appear in the grade field for students whose course registration was canceled on course day one or later. These symbols cannot be changed using ARUCNG screen.

If a student processes a change of name form with the registrar of the offering unit AFTER a grade roster for that student has been printed, the name will not be changed on subsequent grade rosters for that course, even though it was changed on the student file.

**NON-CREDIT TRANSCRIPT FILE UPDATE: Screen ARUSNA**

Staff of the University Registrar have exclusive update capability to screen ARUSNA. The operator will skip to the record by entering an "S" in the ACTN field, the student social security number in the STUDENT ID field, and the semester/year in the SEM field. By pressing ENTER, the operator will cause the system to return with the student's full name (last, first, middle, suffix), and the USERID and the date (MM/DD/YY) of the last update to this record in the LAST UPDATE field. Also shown in the body of the record is the COURSE STATUS, COURSE ABBREV, COURSE NUMBER and SECTION, the UNITS, the PROV/LOC, the DEL, the GRADE, the FORMER GRADE (if any), and the date that the course entry was last updated either by virtue of the course enrollment being moved to the transcript file from the enrollment file at grade reporting, or by virtue of a previous update via this screen. The operator will then enter an "A" in the ACTN field to add a new record or will enter a "C" in the ACTN field to change a record.

The COURSE STATUS can be one of three: REGIST, DROP or CANCLD. The status is carried over from the enrollment file as grade reporting occurs. Courses with a status of REGIST will have a grade of A, A-, B+, B, B-, C+, C, D, F, S, or X. Courses with a status of DROP, were dropped on class day one or later, and will have a grade/symbol of "W". Courses with a status of CANCLD were previously on the transcript file with a grade or a "W", but were later changed to canceled status, and will have a grade/symbol of "CN". If the student was canceled from the course before grade reporting occurred, the course record would not have been moved to the transcript file. All courses on the transcript file must have a grade or symbol as shown above: the grade field cannot be blank. Courses with a grade/symbol of "CN" will not be shown on printed transcripts.

The COURSE ABBREV, NUMB, and SECTION must match a valid course in the TCM for the date shown in the SEM above. If a course from a semester prior to SU95 is entered and no match is made, the operator will have to research the situation and add the course to the UCM for the transcript to be updated. Courses added to the transcript file with a semester prior to SU95 will have a section number of 999.

The UNITS for a course may be changed from one value to another only if the change value is within the minimum and maximum established for the course in the UCM.
The PROV/LOC and DEL of a course is brought from the enrollment file as grade reporting occurs for courses that were offered in SU95 and later. Courses that were given in SP95 and earlier will be converted to the NCRR format and entered into the transcript file accordingly. Other than the conversion, courses prior to SU95 can only be entered using screen ARUSNA. In SU95 and in subsequent semesters, a course record cannot be entered via ARUSNA as long as the enrollment file for that semester has NOT been purged. This means that courses will have to be entered using the registration screen - ARURNI so that charges are set and appropriate bills are paid by the student or by the company/sponsor. AFTER the enrollment file for the course has been purged, the only way to enter the course is by using ARUSNA. If a course registration is entered late via ARUSNA, it is the responsibility of the offering unit to make sure that the appropriate course fees have been paid.

The GRADE field can be updated with a valid grade any time after grade reporting for that particular course has occurred. When the grade is changed, the former grade is moved to the FMR GRADE field and is shown until another grade change for the same course occurs.

The date that the grade was either entered via grade reporting or was entered by the operator will be shown in the DATE field. If the grade is changed, the date the change was made will be entered into the DATE field.

**NON-CREDIT CERTIFICATE UPDATE: Screen ARUSNC**

College offices have update capability to enter certificate notations in the Special Notes and Actions area of the non-credit transcript. The screen is already developed in ISIS, but will need some modifications.

The operator paths to ARUSNC, enters "S" in the ACTN field and the student's social security number in the STUDENT ID field. The system returns with the ARUSNC screen with either the student's name, gender, birth date, home address, or with a message informing the operator that the student is not on ISIS, or does not have a non-credit record.

There are two update fields on the screen: CODE is a five byte field to enter the code of certificate that was awarded; and DATE a 6 byte field shown as MMDDYY, the date that the certificate was awarded. If the code is not known, the operator may enter a "?" in the first byte of the field, press ENTER, and have the system return with a "window" that lists all of the valid certificate codes that exist in code set CNCRCERT. When the appropriate code is found, the operator moves the cursor to the area to the left of the code, enters an "X" in the field, and presses ENTER. The system then plugs that code value into the CODE field. The operator then enters the appropriate "awarded" date into the DATE field. It can be "today's" date or it may be a different date, according to the college offering the certificate.

The name of the certificate may be no longer than 50 bytes. It is left-justified and printed in the first fifty bytes of the Special Notes and Actions area of the transcript on the first available line. The second available line will have the statement "Certificate Awarded on October 27, 1995" or whatever date was entered into the DATE field. If more than four certificates would be awarded (more than eight lines used) the print would go to page two of the transcript.

**NON-CREDIT TRANSCRIPT MESSAGE: Screen ARUSNM**

This screen allows the University Registrar to add appropriate comments or notes to the Special Notes and Actions area of the student's non-credit transcript. The area on the transcript is 50 bytes in each of
8 lines. If it would be necessary to have more area to complete special messages, a second page of the transcript would be used. There is no editing of the entire area, which allows the operator to "free form" as appropriate.

The order of the lines will be determined by the date field which is adjacent to each line. The earliest date will determine the first line, with later dates following in chronological order. Lines that are used to print information regarding certificates that are awarded (using screen ARUSNC) will be shown on the screen with the date and message, and may be altered as appropriate.

The operator will path to ARUSNM, enter an "S" in the ACTN field, and the student's social security number in the STUDENT ID field and press ENTER. The system will return with the student's name (last, first, middle, suffix) and the USERID and date of the last update in the LAST UPDATE field, or will give the message that the student has no non-credit record, if that is appropriate. In the body of the screen, any previously entered information in the TRANSCRIPT MESSAGE area will be shown in the same order as that which would appear on the transcript in the Special Notes and Actions area of the record. If the operator is entering data into the TRANSCRIPT MESSAGE area of a student whose message area is blank, the ACTN code should be "A". If the message area has some data from a previous entry, the operator will use "C" as the ACTN code. The date that is associated with each message line will not appear on the transcript.

OFFICIAL NON-CREDIT TRANSCRIPT: Screen ARUSNT

This screen currently exists in ISIS and is used exclusively by the University Registrar to produce official copies of the non-credit transcript. No changes are required as a result of NCRR.

UNOFFICIAL NON-CREDIT TRANSCRIPT: Screen ARISNU

This screen already exists in ISIS, and will not have to be changed. The operator can print an unofficial copy of the student's transcript by pathing to the screen and entering the student's social security number in the STUDENT ID field and pressing ENTER. The screen will return with the student's name (last, first, middle, suffix), birth date and gender. If the student would happen to have a "hold" from a previous financial or other occurrence, the HOLD field will show a "Y" indicator. To print a copy of the student's record, the operator will determine the printer location and enter the printer ID in the PRINTER ID field and press PF11.

REQUEST OFFICIAL TRANSCRIPT: Screen ARUSTT

This screen already exists in ISIS and is used exclusively by the University Registrar to produce official transcripts, and to account for the place and reason the transcript was sent. The screen also allows the operator to account for the money that is received to pay for the transaction.

At the bottom of the screen, there is a space to indicate which types of records exist in ISIS for the student: either UG - undergraduate; GR - graduate; or MD - medical. To that row, a fourth indicator should be added: NC - non-credit. This way the operator will be able to determine which records exist without having to switch to a different screen. If a non-credit record is requested, the system will return with screen ARUSNT which will enable the operator to produce the record and account for the money.
NON-CREDIT COURSE ENROLLMENT: Screen ARISNE

This screen already exists in ISIS and is used to view the non-credit courses that a student has already completed. The courses are displayed in chronological order from the transcript file. The only changes that are required are to have the course number listed as a five byte field rather than a four byte field as now exists; and to show the "units" field as 003.0 rather than 3.00.

The operator may view the screen by pathing to ARISNE and entering the student's social security number in the STUDENT ID field and pressing ENTER. If the student has taken more courses than will appear on one screen, the indicator "Y" appears in the field to the right of MORE in the lower right of the screen. The operator may see the data on the second or subsequent screens by pressing PF8.

REPORTS

GRADE ROSTERS

The grade rosters used by the instructor to give quality grades or satisfactory grades are explained on page 5.1 and may be printed using screen ARICNP.

GRADE REPORT

Grade reports that are processed each week-end are explained on page 38, and are produced each weekend and mailed from the Office of the University Registrar.

CERTIFICATES AWARDED REPORT

This report may be run by a college, an offering unit or the University Registrar on an overnight basis by requesting the report using a Userform in EMC2 Bulletin Boards.

The report will list all colleges, and certificates that had students who received awards for the period of time chosen by the report parameter (semester or FY). Each certificate name will be the full 50 byte name from code set CNCRCERT. There will be columns for men, women, and total. Each college will have a total of each column, and there will be a row for the totals of the total university. All 13 colleges (to include Behrend, Capital and Hershey) will have an entry if there were students in the college who earned a certificate.

OFFICIAL AND UNOFFICIAL TRANSCRIPTS

The capability to print official and unofficial transcript had previously been developed in ISIS. Screen ARUSNT will be used exclusively by the University Registrar to print official transcripts; screen ARUSNU will be used by offering units, colleges and others to print unofficial transcripts.

Several changes will be required on the transcript print format. In the "Number of Units" field, the letter "S" will appear to the right of the value if the EVM type in the TCM for the course is "S" for Automatic Sprinkler, in which case, the following notation will appear in spaces 52 to 67 in the Special Actions and Notes area: "S = Automatic Sprinkler Unit; 1.0 Unit = 15 hours of instruction". If the letter "R" appears to the right of the units value, it means that the EVM type for that course is "R" for
Carnegie Unit, and "R = Carnegie Unit; 1.0 unit = one year of study in one subject in a secondary school" will be printed. If the letter "T" appears, the message "T = Terminal unit; 1.0 unit = 15 hr of instruction" is printed.

The "Number of Units" field should be displayed as 003.0 rather than 3.00.

In the legend of the official transcript, the wording will need to be changed on the forms slide as follows:

Remove the paragraph "T" to right of unit value identifies terminal unit course.
Change the meaning of the "X" grade/symbol to "No Quality Grade Reported"
Remove the Deferred, Audit and No Grade Notations.
Add "EN = Enrolled"
Change the word "Blue" to "Burgundy" in the lower right box.

The same changes as outlined above need to made in the forms slide of the unofficial transcript, used in the Office of the University Registrar except the change of the word "blue" to "burgundy" in the legend.

**FINAL GRADE AUDIT**

The report will be produced as a part of the next weekly grade report run following the 60 day anniversary of the ending date of the course. It will be printed with two copies, sorted by course within offering unit and will be sent from the University Registrar to the campus registrar or registrar designee. One copy will go to the instructor of the course, and the second copy will be filed at the discretion of the offering unit.

In a later release of NCRR, when IBIS and ISIS are more closely linked, it is recommended that the final grade audit be in the form of a graded roster that would be mailed directly to the instructor at his/her home address.

**WEEKLY REGISTRAR EXCEPTION REPORT**

A report will be run each weekend, that will list students who have completed a course with a "quality" grade, but no grade has been received after thirty days has elapsed from the ending date of the course. The report (TABLE 4 - COURSES WITHOUT GRADES) will be sorted by semester, offering unit, college, course and number, with students in the course in alphabetical order by last name. The output will be routed to the VM Mail account for campus registrar's who have VM accounts or to the EMC2 account of registrar designees who do not have VM accounts.

This is the fourth table of the Weekly Registrar Exception Report that has been identified so far. The other tables show: (1) students who have had changes made to their name, social security number, gender, date of birth, or ethnic background, according to the specifications set forth by the University Registrar; (2) students who are still in "WAIT" status on the enrollment file, even though the starting date of the course has passed; and (3) students who are registered on a date that is 60 or more days beyond the ending date of the course.
COMPANIES

Companies are created and maintained in ISIS (1) to reflect where students work; (2) to identify where bills should be sent for students who present a valid letter of authorization from their company; and (3) so that bills can be sent to pay for groups of students reflected in contracts and memos of agreement that are mutually signed by the company and the university.

MAINTAIN COMPANY/SPONSOR Screen: ARUKM

_Purpose_. Screen ARUKM provides the capability to view, create, and maintain companies and sponsors in the ISIS system.

The screen ARUKM is available for _inquiry_ or _update_. In general, continuing education administrators registrar staffs and financial staff in the offering units need to have inquiry access to the companies and sponsors on the system. Perhaps a smaller group will actually need to be able to update companies and sponsors; certainly staff who are registering students need to be able to identify the sponsors who are paying the bills. Access can be obtained through Area Security Representatives (ASR's) as may be appropriate for each unit. It is suggested that in order to achieve a degree of consistency in the entering of company information, offering units keep the number of employees who can actually update company information to a minimum.
**Skipping to a Record in the Company/Sponsor File.**

A user can skip to a record in the company/sponsor file by entering an "S" in the ACTN field and the Company ID in the ID field. If the company ID is unknown, the operator should first call up screen ARIKQ (The Company/Sponsor Quick Scan screen) to see what the Company ID number is, and then return to ARUKM.

The company/sponsor ID number will be referred to as the "key" for this section. When the key is entered, the system attempts to find that record in the company/sponsor file. If found, the system will display all screen information that is available. Users having inquiry-only capability will be able to view all fields and, if access has also been granted, can then toggle to screen ARUKC to add comments, if appropriate.

If the record is not found, the screen will then display "Record Not Found for Key Entered".

**Adding a New Record to the Company/Sponsor File.**

Users with update capability will be able to add new records to the company/sponsor file. Since the key is the company/sponsor ID, and since the system assigns the numbers in sequential order, there is no need to attempt to skip to a record first, although it is strongly recommended that users first check the ARIKQ quick scan screen to verify that the company is not already on the file.

To add a new company, the user will enter an 'A' in the action field, and then press the PF5 key. The system will then bring up the next available number in the ID field, blank the remainder of the screen, and invite the user to complete the remaining fields. Subsequent uses of the "Enter" key will refresh the screen by providing system-generated values and validity checks where appropriate, and inviting the user to fill in the next field. The following fields are appropriate for data entry:

- **Company name.** Company name must be entered, with a maximum of 30 characters. The field is limited to 30 characters to avoid "clipping" the company name when mailing labels are produced. The company name field may not have a leading blank, and may not contain punctuation marks. **This is a required field.**

- **Business address.** Two lines are provided for a company address: ST1 (Street One) and ST2 (Street Two). Each is limited to 30 characters, again to support later use of labels. ST1 must have an entry, but ST2 can be blank depending, of course, on the address. U. S. Postal regulations suggest that the address lines read from the most specific information on the first line to the least specific on the last line. If an address has a street and number, and a box or apartment number, the box or apartment number is entered on ST1, and the street and number is entered on ST2. The city is limited to 17 characters, has no leading blank or punctuation marks, and should comply with the post office specifications for that city name. The state is limited to the two-letter postal code for the state. Either a five- or nine-digit zip code may be entered, but use of the 9 digit ZIP is highly recommended, if available. For Pennsylvania zip codes, the county will be derived from the zip code by the system with the use of the ENTER key. Likewise, the country will automatically be USA for valid state codes in the United States. Checking will occur such that area code and zip code must be valid for the state. Many label-producing applications will use the city plus state plus zip (17 + 2 + 9 + two spaces) to make a thirty-character label record.

- **Telephone number.** The telephone number is entered in the usual area code plus seven-digit format. While the telephone is not a required field, if it is entered, an area code must be used, and the entries must be numeric.
At least one street line (ST1), a city, and then either state plus zip, or a country, are required. The only special character that should ever be used in a business address is the hyphen. All other special characters (!@#$%^&*()_+={\[}\]\\|\;:\"<,>.?/) should not be used.

FAX number. As with the telephone number, the FAX number is entered with area code plus seven digits. Again, this field is not required, but must contain an area code and must be all numeric if used.

Billing address. The billing address can be left blank. Applications in this project will presume that if billing address is blank, the bills will be sent to the business address above. If the billing address is used, then the data checks specified above for business address will be invoked. It is recommended that use of the ENTER key periodically will check for valid entries and bring up system-derived values.

Business Type. A four-byte code for company/sponsor type can be entered. These codes are indicated in the appendix and will be in a coded data table. The value is either blank, or must be one of the codes in the table. The field is not required.

Number of employees. The number of employees can be entered. If entered, it must be positive numeric > 0. It can be blank and is not required.

Other items on the screen. The screen will also display other items to assist the user:

- The Alumni-Development ID will be displayed if the company was originally captured from that system.
- If comments are on the ARUKC comments screen, the comments field will display a "YES".
- If a hold has been placed against a company, the most recent such activity will be displayed: reason, source and date.
- The service area will be displayed and will be derived from the system from the company zip code.
- The account status, date and the last financial update information will be displayed at the bottom right portion of the screen. The status reflects how weekly company billing batch procedures will be handled. Account Status "AC" = Financial account activity is pending; "CL" = No financial account activity is pending; "WO" = Company account unpaid balance "written off" due to non-payment. If the user finds that a company account was turned over to collection, it would be best to check with the financial officer of the offering unit before new billing activity is entered in the system.
- The date of the last update of the screen and the user ID of the last person to make an addition or change to the company will be displayed.
- The company status is displayed, and will typically be "ACTIVE" except for companies that have been de-activated. Details for de-activating a company are provided below, and should only be used in the rare instance that the company closes its doors.

When all required fields are filled in, the next use of the "Enter" key will invite the user to update the database with the PF12 key. The use of the PF12 key will update the database. If the PF12 key is used
prematurely with errors still on the screen, the PF12 action will be treated as a use of "Enter" and invite
the user to fix the error.

**Changing a Record in the Company/Sponsor File.**

Users with **update** capability will be able to change a record in the company/sponsor file. A user
wishing to change a record will first need to skip to that record as described above, using an 'S' in the
action field to display the record. The user then changes the action field to a 'C' and may proceed with
any of the following changes to the fields indicated. If at this point the key is changed, the user will
receive a message indicating that the key cannot be changed and invited to skip to that new record if a
different key (different company) is desired.

- **Company Name.** The company name may be changed as specified above limited to 30
  characters.
- **Business Address.** The business address may be changed in accordance with the above validity
  checks.
- **Telephone numbers.** The company telephone number and FAX number may be changed in
  accordance with the specifications above.
- **Billing Address.** The billing address may be changed or added in accordance with the
  specifications above.
- **Business Type, Number of Employees.** All fields can be changed in accordance with data
  checks indicated above.

The use of the 'Enter' key will validate data elements and, if all fields are valid, invite the use of the
PF12 key. If all fields are valid, the use of the PF12 key will update the database. If errors still exist,
the PF12 key will behave as the 'Enter' key and will identify errors.

**De-Activating a Record in the Company/Sponsor File.**

If a company closes its doors or ceases to exist, it can be de-activated on the system. When a company
is de-activated, that company ID will remain on the system but can no longer be used in the following
ways:

- The student's workplace address cannot be created from the company file of a de-activated
  company
- The sponsor of an individual student for a course registration cannot be a de-activated
  company
- A contract or memo cannot be written with a de-activated company

To de-activate a company, the user must first skip to the record. Then the action field is changed to a
'D'. The use of the "Enter" key will invite the user to use the PF12 to de-activate the record. If the user
then depresses the PF12, a window will "pop up" for the user to enter a comment regarding this action.
The user must enter a comment at this time, which will then be placed on the company comments file.
This comment will document the action. This comment can later be viewed, and more added, on the
ARUKC comment screen detailed below. The user will be asked to depress the PF12 key once more to
complete the action. A warning message will appear if the company account balance is NOT zero.

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Users are cautioned NOT to de-activate a company that has been discovered to be a duplicate. The merge (screen ARUKJ) process should be used for those cases to be sure that all files are merged with the new company.

**Maintain Company/Sponsor Comments - Screen ARUKC**

The screen ARUKC can be reached either by fast path, from the menu, or from ARUKM via a PF9 toggle. The toggle then works to go back to ARUKM, whether or not the user came from there in the first place.

**Purpose.** The purpose of this screen is to allow the users to keep a log of comments about a particular company, such as company calls, interactions with the company that may have occurred, or billing and payment history if appropriate. The comments will be displayed in descending order with most recent appearing first.

**Skipping to the Comments for a Company/Sponsor.**

The user who comes to the screen by way of path or menu enters an 'S' in the action field and the company ID. If the company is found in the database, the company name is displayed and all comments associated with that company, starting with the most recent first. (If no comments are on the database, a message will appear indicating "No comments found", but the company name will still be displayed.) Also displayed will be the date each comment was created, and the user ID of the person who entered it. If comments continue on more than one screen, the continue flag is set to 'Y' by the system, and another use of the "Enter" key will result in seeing more comments.

If the user comes to this screen by way of the toggle from ARUKM, the company name will be displayed as will the comments, if any exist. The toggle is treated the same as skipping to the record.

**Adding a Comment to the Company/Sponsor Comment File.**

To add a comment to the file, the user must first skip or toggle to the comment screen for that comment as indicated above. Then the user changes the action field to 'A', which permits the user with update capability to add a new comment. The length of the comment is 174 characters (three lines of 58 characters each). The date of this comment and the user ID will be inserted by the system. By using the "Enter" key the user will be invited to use the PF12 key to update the database. The use of the PF12 will update the database.

The user can toggle back to the ARUKM screen using the PF9 key.

As indicated above, if a company record is to be de-activated, the user will be required to enter a comment via a "pop-up" window which will be displayed among the other comments on this ARUKC screen in appropriate order. Thus, the user can identify why a company was de-activated and what the circumstances were surrounding the action.
The Quick Company/Sponsor Scan - Screen ARIKQ

Purpose. This is the most frequently used screen in this chunk of the project. Unless the company ID's are taped onto one's terminal, the normal method of finding a company ID is to use this quick scan screen. In addition to the fast path and menu, a version of this screen is accessible as a pop-up window in the following screens:

ARUSNP: When creating or updating student information, a pop-up window is available to identify a company in the workplace address, and bring the company information back to that screen.

ARURNI: When registering a student for a course, a pop-up window is available to identify the company as a sponsor for the student.

ABKC: When creating a new contract or memo of agreement, a pop-up window is available to identify the company with whom the contract or memo has been written.

The user of this screen may identify up to four search areas to locate companies fitting the requested criteria. The user may enter Service Area, County or State, Zip Code or partial ZIP code, and up to ten characters of the Company Name. The Boolean selection is "and", such that indicating Service Area = 'BR' and Short Name = 'Pepsi' lists all the company names starting with 'Pepsi' in the BR service area (i.e., all companies starting with the five letters 'Pepsi' AND which are in the BR service area).

The user is reminded that if too few or no companies appear, it may be that the selection criteria was too restrictive. Specifying a service area, a zip code, a county, and a short name may restrict the search to few or in fact no companies matching the combination of criteria specified. Of course, that may also mean that the company being sought is not on the system and needs to be created on the ARUKM screen.

If the user came to this screen as a pop-up from another application, selecting one of the companies shown will return the user to the original screen, with the company information in the fields of the original application. If no company is selected when coming from ARUSNP (Create/Maintain Student Information), the user will be returned to that screen. If no company is selected when coming from ARURNI (Individual Registration Screen) or ABKC (Maintain Company/Sponsor Contract Memo), the user will be taken to the screen ARUKM (Maintain Company/Sponsor) to create the company. Up to 14 companies may be shown on the screen depending on selection criteria. If the user came to this screen from the menu or fast path, the selection of one of the 14 companies will take the user to the ARUKM screen, Maintain Company/Sponsor, showing the complete information on the company selected. If no company is selected, the use of the "Enter" key will take the user to a blank ARUKM screen to create a new company.

If the selection criteria yields more than 14 companies, the use of the PF8 will advance the user to the next page of companies satisfying the search criteria.

Merge Company/Sponsor - Screen ARUKJ

Purpose. Occasionally duplicates will be discovered in the company/sponsor file. Since the company ID's themselves are system-generated and not numbers that the company gives us, there will be instances when company records are created even though other occurrences exist on the database. When this happens, it is not necessarily because one is correct and the other is incorrect; nevertheless, it is desirable to merge the two companies on the system. The screen ARUKJ, Merge
Company/Sponsor, should be used to merge the two records into one. That is, the use of this screen will set in place an overnight job that will run and examine all the database files and merge the records on each of those files.

Users should be reminded that the merge is the preferred procedure when duplicates are discovered, because it examines all database files for the duplicate numbers and changes any occurrences of the secondary number to the primary number in the records. It is recommended NOT to use the de-activate procedure to eliminate duplicates, because if student workplace records exist, or bursar records exist, the de-activate procedure will not update the files to a new ID for that company.

**Performing the Merge.** The user will enter an 'S' in the action code, followed by both company/sponsor ID numbers. The ID number of the company that is entered in the primary ID area will be the one that will be retained after the merge job is run. The ID number of the company that is entered in the secondary ID will no longer be available after the merge.

The use of the "Enter" key will bring information about both companies to the screen. If either company ID is not found in the database, a message will be displayed indicating which ID was not found and inviting the user to submit a correct ID. The user should ascertain that both companies are indeed the companies to be merged, and that the information in the primary fields are the ones to be retained. The user then changes the action code to an 'M' (for merge). If the user presses the ENTER key, the system will respond with a message inviting the user to press the PF12 key to submit the job for merging the records. If the user depresses the PF12 without having used "Enter", that action is also acceptable as long as an 'M' was in the action field. A message is returned indicating that the job will be submitted to run after 5:00 P.M..

The system will assume that all fields specified on the company file for the primary company ID will remain and are correct. None of these fields will be over-written by the merge, even if they are blank in the primary record and not blank in the secondary record. Thus, it is important that the user verify that all fields for the primary ID are correct. Further, all comments--primary and secondary--will be merged by date, and a new comment will be generated by the system when the merge job is run indicating that the merge job ran successfully, and showing the date as well as the old (and now defunct) ID number. Thus, all comments--old and new--will be part of the comments now associated with the company ID that remains.

Other file searches and changes: The merge job will search the student file for student workplace ID's, and change the workplace ID only, not the other parts of the students' workplace addresses. The job will also locate all bursar records and convert company information to the primary ID number. Finally, the job will locate all contracts and memos of agreement that use the secondary ID number and change them to the primary ID number.

Maintain Company/Sponsor Contract/Memo - Screen ABKC

**Purpose.** The purpose of the screen ABKC is to create and maintain contracts and memos of agreement on ISIS and to associate them with the companies and sponsors with whom these agreements are made. This in turn will allow registrations of groups of individuals and billings to the companies and sponsors for the memos and contracts as agreed upon.

The key for records in this section is the contract or memo number. The key will consist of a 'C' (for contracts) or an 'M' (for memos of agreement), followed by left-justified digits or characters that comprise the contract or memo number. Leading zeros will be typed in the field if they are shown on the memo of agreement or on the contract.
**Skipping to a Contract or Memo of Agreement.**

The user enters an 'S' in the action field, and then a 'C' (for contract) or 'M' (for memo of agreement) followed by the contract or memo number **left-justified**, as explained above. The use of the ENTER key will bring up that contract or memo number if such a record exists. If the record does exist, all fields will be displayed as indicated on the sample screen in the appendix and as detailed in the section below for adding records to this file. That is, the display will show any information about the company with whom the contract or memo has been written, as well as details of the memo or contract, and any TCM records created for this memo or contract.

If a match is not found, the screen will be display the message "No Record Found for Key Entered". The user may then proceed with adding the record as detailed in the next section if appropriate.

**Adding a New Contract or Memo of Agreement.**

The user should first make certain that the company or agency with whom the memo or contract has been written is indeed on the company/sponsor file.

The user must first attempt to skip to the record as described above. If there is no record found, that contract or memo of agreement number can be added. The user now changes the action field to an 'A'. Any use of the ENTER key from this point on will invite the user to fill in the next field.

The following fields can then be entered by the user:

- **Company/sponsor ID number.** If the company sponsor ID is not known, placing a question mark '?' in the left-most position and using the ENTER key will result in the pop-up window version of the screen ARIKQ, the Quick Company/Sponsor Scan. Then, using the selection criteria as needed to find and select the company, the company information (ID plus billing address) will be displayed again on this screen. If the company is not on the company/sponsor file, the user must first create that company on the ARUKM screen. The **company/sponsor ID is a required field** on this screen.

- **Project title.** The project title should reflect as much as possible the wording used on the memo of agreement project title, or wording used in the contract. A total of 156 characters are allowed. **This is a required field.**

- **Attention (ATTN:) field.** This field should be used if the bill is to be directed to an individual's attention in the company to whom the bill is being sent. It is **not required.** A total of 25 characters are allowed.

- **Reference (REF:) field.** An additional field that will be shown on the bill. It could be used to identify the project or identify the company's purchase order number. It is **not required.** A total of 25 characters are allowed.

- **Amount.** The total dollar amount of the memo of agreement or contract must be entered. The number must be positive numeric or zero, and is a **required field.** If the user enters a whole number, the decimal places will be provided by the system.

- **Status.** The status of a contract at the time it is being entered. The default value is "ACTIVE", and the system will insert that value if the field is left blank. Other valid values are "PENDING" or "CANCEL". Note: as this section deals with adding a new record to the contract and memo file, the only choices here are either "ACTIVE" or "PENDING".
Billing schedule. If these fields are left blank, the system will generate a bill for the full amount of the memo or contract on the next billing cycle following the start of the first class created on the TCM. If the company has requested a billing schedule other than that (i.e., special amounts and/or special dates), the billing schedule should be entered. If the billing schedule is used, the dates must be valid dates in the form MM/DD/YY, and the amounts must add up to the total amount indicated above. Again, the user may enter whole numbers and the decimal places will be inserted by the system.

The repeated use of the "Enter" key will invite the user to enter the next required field. If all required fields are entered, the user will be asked to use the PF12 key to create the record. The premature use of the PF12 will result in creating the record if all required fields have been correctly filled in, and will be treated like a use of the ENTER key if errors still exist or required fields are still blank.

Note that when the course section is linked with the contract or memo of agreement on screen ARUCNT, a "Y" code appears on screen ABKC to the right of the ASSESSMENT field.

**Changing a Contract or Memo of Agreement.**

Most fields can be changed, with appropriate cautions, on a contract or memo of agreement. The user will be warned about changing the amount or billing schedule if TCM records have already been created, since the creation of TCM records will result in the charge being set by the system on the company account.

The user first skips to the contract or memo record as detailed above. The action code is changed to 'C'. Repeated use of the ENTER key after this point will check for errors or invite the user to use the PF12 key to update the database. The user can change fields within the guidelines detailed above.

Caution should be exercised before attempting to cancel a contract. If registrations were already taken, the user may need to cancel the student registrations associated with this contract. If a new contract or memo will take the place of one that is being canceled, the new contract or memo should be created first on the system and associated with the appropriate TCM records so that the correct charges can be set. If a contract or memo is canceled, and if this is the only activity on the TCM record (that is, this would have been the only group registration, and there are not individual registrations), then the cancellation of the contract will result in changing the "OK to Register" flag to an 'N' (for No).

A cancellation will result in backing out the bursar charges that may have been set for this contract or memo. A PENDING memo, or an ACTIVE memo, can be changed to CANCEL. A canceled memo cannot be re-activated, and an active memo cannot be changed back to pending.

Also, the dates of the billing schedule cannot be changed to a date that has already passed.
Quick Company/Sponsor Contract Scan - Screen ABKQ

Purpose. The purpose of this quick scan is to identify all contracts or memos written with a given company over time, with most recent appearing at the top of the screen. By selecting one of the contracts or memos identified on the screen, the system will bring up the ABKC screen, Maintain Company/Sponsor Contract/Memo for that particular contract or memo.

This is an inquiry-only screen. The user selects a company and then can view all contracts or memos written with that company, and select one of them for viewing in greater depth on ABKC.

Viewing the Contracts & Memos of Agreement for a Company.

The user places an 'S' in the action code and enters the company/sponsor ID in the appropriate field to skip to the company's contract and memo records. The use of the "Enter" key will display the company name and up to 16 contracts or memos that have been written with that company. If more than 16 contracts and memos exist, the use of the PF8 key will advance the user to the next screen. If the company ID is not found in the database, an appropriate message will be displayed. If there are no contracts or memos for the company, the company name will still be displayed and a message will indicate that no contracts or memos were found for the company selected.

The user may then select the item number of one of the contracts displayed, and upon using the "Enter" key, the user will be passed to the ABKC screen, Maintain Company/Sponsor Contract/Memo, where more information about that contract or memo can be found. Depressing the ENTER key with no selection will take the user to a blank ABKC screen.

Maintain Service Areas for Continuing Education Offering Units Screen AMMS

Purpose. A number of screens use the notion of the "Service Area". This is the continuing education service area associated with the CES campuses and centers and the CE centers. These service areas do not match exactly with the admissions service areas that are now maintained by the Undergraduate Admissions Office on screen AUTZ. (That is, for admissions purposes, applicants in the Williamsport area are referred to the Wilkes-Barre campus, and applicants from Malvern are referred to the Delaware County campus. For non-credit courses, the continuing education service areas represented by these two examples would be the Williamsport Center and Great Valley, respectively.) Thus the AMMS screen that permits the updating and maintaining of continuing education service areas without changing the corresponding admissions areas.

The screen AMMS will only support the five-digit zip code. Thus, the service area for this project can be viewed or changed only for the five-digit zip code. It is recognized that some companies will provide their full nine-digit zip code, and they can be used in the company address field as noted previously. However, the service area will be associated with the first five digits of the zip code whether or not all nine digits are provided.

Skipping to or Changing a Service Area Record.

Since this screen only involves two fields (zip and service area), we are specifying all actions within this section. All changes to this file are made by a representative of the University Registrar. The operator will first skip to a record by entering an 'S' in the action field and a five-digit zip code. If the zip code is in the file, the service area will be displayed. Users with update capability will be able to
change a record by then changing the action code to a 'C', typing in a new, valid service area, and 
depressing "Enter". If the service area is valid, the system will invite the user to use the PF12 key to 
change the record. The use of the PF12 key will then update the record and display an appropriate 
message.

This screen will not provide for the ability to add a new zip code to the file. A zip code can only be 
added through the use of the AUTZ screen via a representative of the Undergraduate 
Admissions office.

REPORTS

Producing Labels from the Company/Sponsor File: Report SRRP602

Purpose. To allow offering units to produce mailing labels to send brochures and announcements of 
upcoming courses to companies and sponsors in their service areas.

Labels will be available by service area and within a range of zip codes. The labels will be produced in 
zip-code order. They will be printed in a standard four-across Cheshire format. Forms alignment 
labels will be provided at the beginning of the output to permit the operator to line up the paper or label 
stock. Offering units can select an OAS printer or have the output directed to a CMS account. If the 
output will be printed on pressure-sensitive labels, specifications will be developed for ordering the 
appropriate label stock. An Emc² Userform will be prepared to allow offering units to select a service 
area or a range of zip codes. If a service area and a range of zip codes are specified, the Boolean use of 
"and" will be used to select companies within the service area and the specified range of zip codes. 
The Userform will also allow the selection of an OAS printer or a CMS account ID. The job will 
typically be run overnight as are other batch jobs in OAS. The jobs can be requested via MSCHED as 
the campuses now request class lists and other reports, and may be scheduled in advance.

FANS REVIEW and FINANCIAL REPORTS

Frequently Used Terms in Student and Company Account Systems

A number of data elements associated with the posting of transactions appear on many of financial 
screens. Rather than detail each data element on each screen, the following is a list the more 
frequently used elements on the financial screens.

Dates: Generally all dates will be entered as MMDDYY. Most dates will default to today's 
date. The "DATE" field on ABAA is the past cycle date selected by the operator the to view 
transactions from that date to present. If no date is entered by the operator, the system defaults 
to today's date minus seven days. The cycle date is today's date, or the date that the transaction 
was actually posted on the student's account, and will be used to track daily activity. The 
effective date will default to today's date, but can be changed to reflect a date on which a 
transaction is to be effective in a student's account. The post date is used to reflect a charge for 
a previous semester, but the money is posted into the current semester.

TXN TYPE (Transaction Types): There are actually two forms: the short form for posting 
and the expanded form for viewing transactions already posted. The "2-5-3" transaction type is 
the short transaction type used for efficient posting. The "5-13-5" is the expanded, displayed 
version of the "2-5-3" with more readable information. The first field is the process, whose 
values are in the code set CTYPEPSR. The second field is the transaction ID, which is
identified the FANS transaction file. The third field is the transaction **description**, whose values are in the codeset CTYPEDSC.

**SRC (Source)** The source is a two-byte code used on many of the financial screens that identifies the entity such as the Bursar or a campus that originated the financial action.

**TYPE:** The type is a four-byte field indicating whether the payment was cash, check, credit card, or IDT.

**CC/CHECK/PYMT #:** This is an unedited 16-byte field that represents either the credit card number, the check number, or the receipt number if the payment was cash.

**CC:** The credit card type is blank (if the payment is not a credit card), or M (for Mastercard) or V (for Visa).

**NP:** The code NP stands for "no post", and refers to a transaction such as a refund check that is already posted on the accounting files.

**RESPON:** The value of RESPON is set to 'Y' if the registrant is responsible for the returned item. It will default to 'Y' (yes), but can be changed to blank if it is later determined that the registrant was not at fault (e.g., bank error) or if a third party wrote the check.

**SEM/SCHED NUMBER:** The combination of the semester and the six-digit schedule number is a unique key for the TCM record. For charges set by the registration activity, these two data elements appear on the student account. We also capture this information on payments by third parties. This 10-byte code is always posted in the FANS field FREE SPACE to link the course section in ISIS to the IBIS system.

**FANS (Financial Accounting NumberS):** The new system in IBIS that is used to keep track of income and expenditures, while giving the individual budget administrator control over how the items are separated. When making reference to FANS, include all of the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget:</td>
<td>99-999-99_XX</td>
</tr>
<tr>
<td>Fund:</td>
<td>XXXXX</td>
</tr>
<tr>
<td>Object</td>
<td>XXXX</td>
</tr>
<tr>
<td>Dept Sub-Object</td>
<td>XXXXXXXX........XXXXXXXXXXXXXXX (30A)</td>
</tr>
<tr>
<td>Cost Center</td>
<td>XXXXXXXXXXXX (10A)</td>
</tr>
<tr>
<td>Activity</td>
<td>XXXXXXXXXXXX (10A)</td>
</tr>
<tr>
<td>Free Space</td>
<td>XXXXXXXXXXXXXXXXXXX (15A)</td>
</tr>
</tbody>
</table>

For the purpose of clarifying what might have been otherwise ambiguous heretofore, a student's charges will be set on the **student account** unless the student presents a letter of authorization to bill his or her company with the registration. In those instances where a letter is presented, the charges will be set on the **company account**, and the company will ultimately receive a bill for the student's course. This screen, ABAA, and this chunk of the project, deal only with the **student account**. Therefore, ABAA will be used to post payments made by the student, and by those third parties not appropriate for the company/sponsor file, such as payments made by family or friends of the registrant.

**Penn State IDT's:** Related to the above paragraph, Penn State employees who take non-credit courses and who present an IDT for payment will have the charges set on the **company account**. Inasmuch as Penn State is the employer (indeed, a large one), and presenting an IDT is similar to presenting a letter
of authorization, it is in the spirit of our system that charges be set on the company account. Further, the IDT represents a payment by the "company" (Penn State) on their account.

STUDENT ACCOUNTS

I. NON-CREDIT STUDENT ACCOUNT ACTIVITY Screen: ABAA

Purpose. This is the major posting screen in this chunk. Users who are already familiar with ABAS will find the function similar for ABAA, with several important extra features. First, recent account activity—payments and charges—will be displayed at the top of the screen, starting with a cycle date forward. If the student has a hold or a return item history, those flags will be displayed. All forms of payment will be supported, including cash, check, and credit card. When a third party pays, information about the check writer or cardholder can be maintained to support subsequent refunds as needed. This screen is the primary gateway to the student account.

Using the screen.

The user will be required to enter an 'S' in the ACTN field (to "skip" to the student's account) and the student ID (Social Security Number). If no date is entered, today's date minus seven days will be entered. It is recommended that the user select a date that will show the amount of account activity that is desired.

Upon depressing the "Enter" key, the following items will be displayed:

The student's name will be shown.

If the student has one or more holds, the reason for the most recent hold will be shown.

If the student has a return item history, and was responsible for at least one of them, a "yes" will be displayed.

Up to seven transactions from the student's account will be displayed, from the cycle date forward. If there are more than seven transactions from the cycle date forward, the user can revise the cycle date or use the PF8 key to display the additional transactions. Each transaction record displayed will include:

• The cycle date of that transaction
• The "5-13-5" transaction type
• The amount of that charge, discount, or payment.
• The source
• The type of payment (cash, check, or credit card). As noted earlier, an IDT will not be posted on the student account.
• The credit card number, check number, or receipt number will be displayed if the transaction was a payment, or the course ID number will be displayed for a charge.

• The semester will be displayed for charges and for payments made by third parties.

The user will be able to post a transaction by first changing the ACTN field to an 'A', and then filling in the transaction information at the bottom of the screen. Using the "Enter" key will cause the system to check for errors, bring back system-generated values, invite the user to fill in the next required field, and ultimately invite the user to depress the PF12 key to post the transaction on the student's account.

In posting a transaction, the user must enter the amount, the "2-5-3" transaction type, the source, the type of payment (check, credit card, cash), the check number, credit card number, or receipt number for cash, the credit card type if it was a credit card, the effective date if different from the cycle date. Also, regarding the payer, the user needs to identify whether the payer was the registrant himself or herself, and if not, the information about the course ID and payer needs to be entered.

The course ID and semester need to be entered for a tuition adjustment when done on this screen and not accompanied by a registration screen transaction.

In general, it will be assumed that when the registrant pays on his or her own account, it is simply a payment on account and not necessarily applied to a specific course. If a third party pays for a course, the user must enter information about not only the payer, but also the course for which the payment was intended to be applied. This will result in refunds being properly processed—to the correct person and for the correct course—if the need should occur.

After all fields have been correctly entered, the user will be invited to use the PF12 to update the database. The premature use of the PF12 (using PF12 before being invited to do so) will indeed update the database if all required fields have been filled in correctly. If errors still exist, or some fields have not been filled in, it will be treated as a use of the "Enter" key and the user will be invited to fill in the next field or correct the error.

II. NON-CREDIT DETAIL STUDENT ACCOUNT Screen: ABAD

Purpose. This screen will provide details of all the data elements associated with each transaction on the student account. Because of the many data elements shown, it is only possible to show two transactions on this screen. It is similar to the ABAF screen used in credit. This screen, ABAD, shows the full string of FANS numbers associated with each transaction. It is an inquiry-only screen.

Using the screen.

The user will be required to enter an 'S' in the ACTN field, and the student ID. As with the above ABAA screen, the user should supply a cycle date that is appropriate to viewing the desired transactions. If none is supplied, it will default to today's date minus seven days, but that may not reveal any transactions if none were done in the past week.

The use of the "Enter" key will then return the student's name, and up to two transactions from the cycle date forward. The "more" indicator will indicate if more than two transactions are available for viewing; the user can then adjust the cycle date to see more recent transactions or use the PF8 key (or "Enter") to view the additional ones on the next page of the screen.

The following data elements will de displayed for each transaction; certain fields will be blank depending on whether the transaction was a charge or a payment.
Cycle date
Effective date
Post date
Transaction type
Transaction code
Amount
NP (no post?)
Source
Clerk who did the posting
Update date of clerk who did the posting
Credit card type
Credit card number/check number/receipt number (for cash)
Type (credit card, check, or cash)
Schedule number and semester (of course that caused the charge or payment)
All Financial Accounting Numbers (FANS)
Payer name (if other than registrant, but not a company)
Override

III. DAILY ACTIVITY SUMMARY Screen: ABGD

Purpose. This screen will provide information to tellers who post payments by showing details and totals for cash, checks, credit cards, and IDT’s for any specified time window of a cycle day. If a teller has been posting for a period of time and wants to bundle those postings and know they have been recorded accurately, this screen provides all the posting details and totals, as well as a hard copy print that can be put in the safe with the bundle and the adding machine tape. It is an excellent tool for finding errors before closing out for the day, and it can be used by the teller at any time to provide assurance that totals are correct.

This screen provides information about all postings of non-credit activity to student accounts and company accounts.

Using the screen.

The user is required to enter an 'S' in the ACTN field and a userid. The optional fields are cycle date, start time, and stop time. If no cycle date is entered, the cycle date defaults to today's date. If no start
time is entered, the start time defaults to 8:00 a.m.. If no stop time is entered, the stop time defaults to
the current time. Using the "Enter” key brings back all transactions posted by that user for the
specified time window between start and stop time. Totals at the bottom of the screen reflect totals for
the entire time window, even if additional transactions will appear on subsequent pages.

If there are more transactions than can be shown on one page of the screen, the use of PF8 key (or
"Enter) will display additional transactions. Again, the totals at the bottom are for the whole bundle,
regardless of how many transactions actually appear on the screen being viewed.

The hard copy feature can be activated by placing a 'Y' in the HC field, and depressing "Enter". The
printer TID should appear automatically as in other ISIS applications if one has been identified with
the terminal being used.

V. NON-CREDIT RETURNED ITEM Screen: ABAR

Purpose. This screen will allow the user to record a returned item (usually a check, but sometimes a
credit card payment) from the bank on the system. The user will be given the opportunity to select the
payment from the recent payment history, and thus display details of the payment that was returned.
The user can then decide if the check should be re-deposited, and can also turn off the returned item
charge if not appropriate in this case.

Using the screen.

In order to use this screen, the staff must first identify the student's account for whom the returned item
was originally written. That is not always easy if the student's ID number is not written on the check.
We therefore encourage all offering units to request that student ID's be shown on all checks. In the
rare event that there is no clue on the check as to whom the item was for, the user might start with the
deposit date and the check stamp to determine the source and the date of entry on the system. From
that point, the Daily Transaction Report for the date of entry on the system, and for that source, ought
to reveal the student ID associated with that check.

The user will enter an 'S' in the ACTN field, the student ID, and a cycle date that will reveal this
particular check based on its date. Using the "Enter" key, the student's name should appear, and the
account transactions from the cycle date forward. The user then selects the payment that corresponds
to this returned item, and places that number in the SELECTION field. This time, upon use of the
"Enter", the details of the selected item appear at the bottom of the screen.

The user now changes the ACTN field to 'A' (to add this transaction to the student account), and moves
the cursor to the bottom line to enter a new transaction ID, a reason (2A), whether the item should be
re-deposited (defaults to 'Y' for yes), whether the student should be charged a returned item fee
(defaults to 'Y' for yes), and whether the student was responsible for the returned item (defaults to 'Y'
for yes). The use of the "Enter" key will check for valid values in these fields on the bottom line
and/or invite the user to fill in the next field. If the 'A' remains in the ACTN field, and all fields are
entered correctly, the system will invite the user to depress the PF12 to update the database. If the user
depresses PF12 prematurely (before being invited to do so), the system will check for errors, and
finding none, will update the database. If errors remain, the action will be treated as a use of the
"Enter" key and the user will be asked to take corrective action.

VI. Non-Credit Returned Item History Screen: ABAG

Purpose. Often the writer of a returned item is aware of it as soon as the offering unit is aware. The
registrant may desire more information, or may want to take corrective action. This history screen
shows all returned items for a particular student. The user will be allowed to change the values for the
ten-dollar returned item charge, or change the value of the responsibility for the returned item.

**Using this screen.**

The user enters an 'S' in the ACTN field, and the student ID. The system will return the student's
name, followed by the following items for each returned item:

- The selection number
- The credit card number, or check number
- The credit card type
- The amount
- The transaction ID
- The reason
- Whether the payer was the student
- Whether the item was to be re-deposited
- Whether there was a charge for the item
- The cycle date of the returned item

Normally, the use of this screen will be to inquire about returned items. However, it is possible to
make a change in two of the values being retained in the returned item file. To effect these changes,
the user selects the particular returned item by placing the item number in the SELECTION field, and
depressing "Enter". The detail of that returned item is then displayed. There are now only two up
datable fields:

- The charge for that item.
  - If the user changes this field from 'Y' to 'N' or blank (because it was determined the
    student should not be charged the ten-dollar fee), the charge is backed out of the student
    account. If the user changes this field from 'N' or blank to 'Y', the student account is
    charged. In either case, the new value is retained on the returned item file.

- The responsibility for that item.
  - If the user changes this field from 'Y' to 'N' or blank, or from 'N' or blank to 'Y', and the
    new value is retained on the returned item file.

**VII. Non-Credit Refund Request Screen: ABRN**

**Purpose.** This screen allows the user to view recent payment transactions in the student's account,
select one, and request a refund. This will generate a refund check (if the payment had been cash or
check), and will in all cases update the student's account. The screen also includes information that
may be important to the user requesting the refund, such as hold information, returned item history,
and balances in the student's credit-course account.
Batch Refund Discussion. The JAD team on this chunk discussed the need for a batch refund in Chunk #10 (Billing, Refunds, and Batch Procedures) that allows the system to generate refunds from the transaction logs for CANCEL transactions on the registration screen if:

- the payer was the student him/herself,
- the account balance equals or exceeds the amount of this payment,
- there are no holds, and
- the balance for credit courses is zero or negative.

If these conditions are not met, the bursar staff must use this screen (ABRN) to request the refund.

**Using the screen.**

The user enters an 'S' in the ACTN field, a student ID number, and a cycle date that corresponds with when the person may have made the payment. The system will return the following information:

- The student name (last, first, middle up to thirty characters)
- Hold information (if a hold exists, the reason for the last hold)
- Return item history ("Yes" if there are returned items and if the student was responsible for at least one of them)

Transactions from the cycle date forward showing:

- The selection number
- The amount
- The check, credit card, or payment number, and card expiration date
- The credit card type
- The semester and course ID for third party payers
- The payer's name for third party payers.

The user then selects one of the transactions and depresses the "Enter" key. The full detail of that payment is then displayed, showing check number (or credit card number or payment number), the amount of that payment, the account balance, the payer (now the payee), and the payee's address. The refund amount will default to the smaller of the amount of that payment and the account balance; it can be changed by the user to be any value up to the larger of the two amounts. The source will default to the source of that payment, but may be changed to a new value if it is not appropriate for the refund check to go to the original source. The payee's address cannot be changed on this screen. The payee's name can only be changed in the unfortunate event that the student is deceased. The student's balance for credit courses is also shown at the bottom of the screen.

After a particular payment is selected, the user is requested to change the ACTN field to 'A' and use the PF12 to request the refund and update the student's account. If the PF12 is used prematurely (before being invited to do so), the system will update the database if no errors are present, or invite the user to take corrective action if errors are detected. If an 'S' still remains in the ACTN field, and the user depresses PF12, the system checks for errors, invites the user to change the ACTN field to 'A' and again depress the PF12.
Refunds requested in this manner will result in a check being prepared in the overnight batch check preparation, and will be sent to the source the following business day. Refund checks will be distributed to the students by the source.

VIII. Non-Credit Financial Accounting Numbers Screen: ABTG

Purpose. The screen allows the user to create five-character transaction ID's and associate them with the full string of FANS numbers in a table. Primarily it will be used for payment transactions--associating bank accounts with payments--since charges will typically be set from the registration activity and will bring all FANS numbers from registration to the student account.

Using the screen.

The user enters an 'S' in the ACTN field, followed by a transaction ID. If that ID is already in the file of transaction ID's, the full string of FANS numbers are displayed for that ID. If not, the user is invited to change the ACTN field to an 'A', and enter the remaining fields on the line:

- The source (optional)
- The description (13A-required) This associates the displayed version with the ID
- The budget (optional)
- The fund (optional)
- The object
- The sub-object (optional)
- The cost center (optional)
- The activity (optional)
- Free space (optional)

The use of the "Enter" key will check for errors, invite the user to fill in the next required field, and eventually invite the user to depress the PF12 key when all required fields have been correctly entered. The premature use of the PF12 key (depressing the PF12 key before being invited to do so) will result in updating the database if no errors were detected, or in messages inviting the user to fill in remaining required fields or fix errors.

Changes and deletes: Typically it will be very rare to change or delete a transaction in the table, but changes and deletes are possible. By skipping to the transaction ID, the user should first display the FANS information associated with that ID. The user can then change the ACTN field to a 'D' and delete that transaction ID from the table using the PF12. Deleted transaction ID's are then no longer available for use. Or, after first skipping to the transaction ID, the user can then change the ACTN field to a 'C', and change one or more of the fields to a new (and permitted) value. All data checks will occur. The user must use the PF12 to accomplish the change.

IX. Financial Accounting Numbers by Transaction Type: ABIL
Purpose. This screen will allow a user to enter a transaction ID or a source, and find all associated transaction ID's associated with the search criteria. It will not be heavily used, but it will allow the user to find transaction types when they are not known, or find all transaction ID's associated with a particular source. This is an inquiry-only screen.

Using the screen.

The user may enter either a transaction ID or a source. If a transaction ID is entered, the search begins with a transaction ID that is greater than, or equal to, the ID that was entered, and displays all ID's from that point forward, filling the screen. If a source is entered, the search will be for only those records matching that source, and sorted in ascending order of transaction ID's. If both are entered, the transactions matching the source, and greater than or equal to the ID, are displayed. The following detail is shown for each transaction:

- The transaction ID
- The source
- The 13-character description
- The budget
- The fund
- The object
- The sub-object
- The cost center
- The activity.

X. Financial Accounting Numbers by Fund/Budget: ABIN

Purpose. This screen will allow the user to search for transaction ID's if the fund and budget are known. Again, this is an inquiry-only screen.

Using this screen.

The user may enter a fund, or a fund and a budget. The sort on the display is by budget number, so if a budget and fund are entered, the display begins at that starting point and shows all transaction ID's from that point forward. If only a fund is entered, all budgets matching that fund will be displayed. A fund must always be entered. The following information will be displayed for each record:

- The fund
- The budget
- The object
The transaction ID
The 13-character description
The sub-object
The cost center
The activity
XI. DAILY TRANSACTION ACTIVITY Report:  VPAR2120

Purpose. This is the official document with which the previous day's postings must agree. The report will be generated for each source, and will be sorted by source and then by teller ID. The report should be in exact agreement with the ABGD screen that should have been used throughout the posting day by tellers to total bundles of registrations that were posted.

The report will run automatically each night. A copy will be sent to each source office for verification.

XII. AUDIT REPORT OF REFUNDS:  VPAR2121

Purpose. This report will be generated from the transaction logs kept by the system for refund activity. The report will be generated for those refunds provided to students that are in excess of the minimum of the amount originally paid and the account balance, or when the name is changed. That is, sometimes it is more convenient to provide a refund that exceeds the amount paid for a single course (if two courses were canceled and we want to provide only one refund check). Or, on occasion, if a course was canceled for which a third party paid, but the student owes money for another course, we may still want to refund the third party for the canceled course, even if the refund exceeds the account balance at that moment. Finally, it may be necessary to change the name on a refund check being sent to the estate of a student who is now deceased. These types of events do occur, however rarely, and result in good customer service, but the audit report will assure that the capability provided by the refund screen is not abused.

The report will be run each night that refund transaction logs are present. The report will be sent to the University Auditor's office.
COMPANY ACCOUNTS

COMPANY/SPONSOR ACCOUNT Screen: ABKA

Purpose. This is the major posting screen in this chunk, and will probably be used most frequently in posting payments and inquiring into the company account. It is the counterpart to ABAA, the Non-Credit Student Account Activity, specified in Chunk #8. Recent account activity can be displayed, from a specified cycle date forward. If the company has a hold or a returned item history, these flags will be displayed. All forms of payment will be supported, including cash, checks, credit cards, and Penn State IDT's. This screen is the primary window to the company account.

For students who present letters of authorization to bill their companies, tuition charges will be set on the company account. A bill will subsequently be produced for that company.

The following item is being reviewed by the NCRR Financial Policy group.

We have also agreed that students who hand-carry company checks with them when they come to register will likewise have the charges set on the company file, and the check can then be posted using this screen, ABKA, resulting in a zero balance.

Charges will also be set on the company account by contracts and memos of agreement that have been written with a company. The charges are set when the first TCM record is created linking that course to the contract or memo number.

Using the screen.

The user will be required to enter an "S" in the ACTN field (to "skip" to the record) and the company ID number. Since the most frequent use of this screen will be in posting payments related to billings, and since the billings will include a slip to be returned with the payment, we assume the user will usually have the company ID number available. That is, Release #1 is NOT providing a toggle to the Company Quick Scan screen, ARIKQ.

If no cycle date is entered, the cycle date will default to today's date, but normally the user will need to enter a cycle date that reflects when earlier activity occurred in order to view the last few transactions.

Upon depressing "Enter", the following items will be displayed:

  The company name will be shown.

  If there is a company hold, the reason for the most recent hold is shown.

  If the company has a returned item history and if at least one of them indicates the company was responsible, a "yes" is displayed.

  Up to ten transactions from the company account will be displayed, from the cycle date forward. If there are more than ten transactions from the cycle date forward, the user can use the PF8 to display more, or the cycle date can be changed to reflect a different starting point. Each transaction record displayed will include:

  • The cycle date of the transaction
• The "5-13-5" transaction type
• The amount of that charge, discount, or payment
• The source
• The type of payment (cash, check, credit card, or Penn State IDT)

• The credit card number, check number, or IDT number will be displayed if the transaction was a payment. If the transaction was a charge for an individual student, the student ID and SCHED number will be shown. If the transaction was a group charge, the contract or memo number will be shown.

• The semester

At the bottom of this list of transactions, the account balance will be displayed. The balance will be the correct amount even if there will be more than ten transactions.

The user will be able to post a transaction by first changing the ACTN field to an 'A', and then filling in the transaction information at the bottom of the screen. Using the "Enter" key will cause the system to check for errors, bring back system-generated values, invite the user to fill in the next required field, and ultimately invite the user to depress the PF12 key to post the transaction on the company's account.

In posting a transaction, the user must enter:

  The amount
  The "2-5-3" transaction type
  The source
  The type of payment (check, credit card, cash, or IDT)

  The check number, credit card number, receipt number for cash, or IDT number
  The credit card type if it was a credit card
  The effective date if different from the cycle date
  The post date if different from the cycle date
  The no-post field if the transaction was already processed through the accounting files

  The semester and SCHED number if this is for a specific course
  The student ID if this transaction is for a specific student

  The contract or memo of agreement number

After all fields have been correctly entered, the user will be invited to use the PF12 key to update the database. The premature use of the PF12 (depressing PF12 before being invited to do so) will result in updating the database if indeed all fields are filled in correctly. If errors still exist, or some fields have
not yet been filled in, the premature use of the PF12 will be treated as a use of the "Enter" key and the user will be invited to fill in the next field or correct the error.

After successfully using the PF12, the screen will continue to display that company's account as indicated above, with this most recent transaction now showing last in the list of transactions, the account balance updated, and the fields at the bottom of the screen blank. A message will be displayed indicating the database was successfully updated.

II. Detail Company/Sponsor Account Screen: ABKD

Purpose. This screen will provide details of all the data elements associated with each transaction on the company account. Because of the many data elements shown, it is only possible to show three transactions on this screen. It is similar to the ABAD screen specified for Chunk #8 in the student account. This screen, ABKD, shows the full string of FANS numbers associated with each transaction. It is an inquiry-only screen.

Using the screen.

The user will be required to enter an 'S' in the ACTN field, and the company ID. As with the above ABKA screen, the user should supply a cycle date that is appropriate to viewing the desired transactions. If none is supplied, it will default to today's date, but that may not reveal any transactions if none were done today.

The use of the "Enter" key will then return the company name, and up to three transactions from the cycle date forward. The "more" indicator will indicate if more than three transactions are available for viewing; the user can then adjust the cycle date to see more recent transactions or use the PF8 key (or "Enter") to view the additional ones on the next page of the screen.

The following data elements will be displayed for each transaction; certain fields will be blank depending on whether the transaction was a charge or a payment.

- Cycle date
- Effective date
- Post date
- Transaction type ("5-13-5")
- Amount
- Semester and SCHED number
- No-post indicator
- Source
- Student ID if for a student
- Contract or memo number if for a contract or memo
- Clerk who did the posting
- Update date
Credit card type
Credit card number/check number/receipt number/IDT number
Type (credit card, check, or cash)
As many Financial Accounting Numbers (FANS) as can be displayed on one line

III. Company/Sponsor Refund Request Screen: ABKR

Purpose. This screen allows the user to view recent payment transactions in the company account, select one, and request a refund. This will generate a refund check (if the payment had been cash or check), and will in all cases update the company account. The screen also includes information that may be important to the user requesting the refund, such as hold information, returned item history, and the account balance.

There will be no "automatic" refunds for companies in Release #1. Companies with outstanding credit balances will appear on the weekly statements to the offering units, and refunds can be requested using this screen. Since company billing will usually not occur until on or after the first day of class, it would seem that most charges related to canceled courses could be eliminated before bills go out, thus obviating the need to do extensive company refunding.
Using the screen.

The user enters an 'S' in the ACTN field, a company ID number, and a cycle date that corresponds with when the company may have made the payment. The system will return the following information:

- The company name
- Hold information (if a hold exists, the reason for the last hold)
- Return item history ("Yes" if there are returned items and if the company was responsible for at least one of them)

Transactions from the cycle date forward showing:

- The selection number
- The amount
- The cycle date
- The check number, credit card number, payment number, or IDT number
- The credit card type
- The semester and course ID for students
- The contract or memo number if a contract or memo

The user then selects one of the transactions and depresses the "Enter" key. The full detail of that payment is then displayed, showing check number (or credit card number or payment number), the amount of that payment, the account balance, and the contract or memo number. The refund amount will default to the smaller of the amount of that payment and the account balance; it can be changed by the user to be any value up to the larger of the two amounts. The source will default to the source of that payment, but may be changed to a new value if it is not appropriate for the refund check to go to the original source. The company's address cannot be changed on this screen. The address shown on the refund check will be the contract address if the refund is for a contract; otherwise it will be the billing address.

After a particular payment is selected, the user is requested to change the ACTN field to 'A' and use the PF12 to request the refund and update the company account. If the PF12 is used prematurely (before being invited to do so), the system will update the database if no errors are present, or invite the user to take corrective action if errors are detected. If an 'S' still remains in the ACTN field, and the user depresses PF12, the system checks for errors, invites the user to change the ACTN field to 'A' and again depress the PF12.

Refunds requested in this manner will result in a check being prepared in the overnight accounts payable batch check preparation, and will be sent to the source the following business day. Refund checks will be mailed to companies by the source. Again, we think that very few refunds will need to be provided to companies.
IV. Company/Sponsor Returned Item Screen: ABKI

Purpose. This screen will allow the user to record a returned item (usually a check, but sometimes a credit card payment) from the bank on the system. The user will be given the opportunity to select the payment from the recent payment history, and thus display details of the payment that was returned. The user can then decide if the check should be re-deposited, and can also turn off the returned item charge if not appropriate in this case.

Using the screen.

In order to use this screen, the staff must first identify the company account for whom the returned item was originally written. Typically that would involve the use of the Company/Sponsor Quick Scan screen, ARIKQ. In the rare event that there is no clue on the check as to whom it was for or who wrote it, the user might start with the deposit date and the check stamp to determine the source and the date of entry on the system. From that point, the Daily Transaction Report for the date of entry on the system, and for that source, ought to reveal the company ID associated with that check.

The user will enter an 'S' in the ACTN field, the company ID, and a cycle date that will reveal this particular check based on its date. Using the "Enter" key, the company's name should appear, and the account transactions from the cycle date forward. The user then selects the payment that corresponds to this returned item, and places that number in the SELECTION field. This time, upon use of the "Enter", the details of the selected payment appear at the bottom of the screen.

The user now changes the ACTN field to 'A' (to add this transaction to the company account), and moves the cursor to the bottom line to enter a new transaction ID, a reason (2A), whether the item should be re-deposited (defaults to 'Y' for yes), whether the company should be charged a returned item fee (defaults to 'Y' for yes), and whether the company was responsible for the returned item (defaults to 'Y' for yes). The use of the "Enter" key will check for valid values in these fields on the bottom line and/or invite the user to fill in the next field.

If the 'A' remains in the ACTN field, and all fields are entered correctly, the system will invite the user to depress the PF12 to update the database. If the user depresses PF12 prematurely (before being invited to do so), the system will check for errors, and finding none, will update the database. If errors remain, the action will be treated as a use of the "Enter" key and the user will be asked to take corrective action.

V. Company/Sponsor Returned Item History Screen: ABKH

Purpose. Often a company will be aware that one of its checks was returned as soon as the offering unit is aware. The company may desire more information, or may want to take corrective action. This history screen shows all returned items for a particular company. The user will be allowed to change the values for the ten-dollar returned item charge, or change the value of the responsibility for the returned item.

Using this screen.

The user enters an 'S' in the ACTN field, and the company ID. The system will return the company's name, followed by the following items for each returned item:

The selection number
The check number, credit card number, payment number, or IDT number
The credit card type
The amount
The transaction type (check, credit card, IDT, or cash)
The reason
Whether the company was responsible
Whether the item was to be re-deposited
Whether there was a charge for the item
The cycle date of the returned item
The user ID who processed the transaction

Normally, the use of this screen will be to inquire about returned items. However, it is possible to make a change in two of the values being retained in the returned item file. To effect these changes, the user selects the particular returned item by placing the item number in the SELECTION field, and depressing "Enter". The detail of that returned item is then displayed. There are now only two up datable fields:

The charge for that item.
If the user changes this field from 'Y' to 'N' or blank (because it was determined the company should not be charged the ten-dollar fee), the charge is backed out of the company account. If the user changes this field from 'N' or blank to 'Y', the company account is charged. In either case, the new value is retained on the returned item file.

The responsibility for that item.
If the user changes this field from 'Y' to 'N' or blank, or from 'N' or blank to 'Y', and the new value is retained on the returned item file.

SCREENS AND REPORTS SPECIFIED EARLIER

**ABGD: Daily Activity Summary.** This screen will provide teller support throughout any day of posting as the teller may need. The screen will show all postings from a given time forward and will reflect totals of checks, credit cards, cash, and IDT's at the bottom. A hard copy feature will be available. This screen will provide an excellent way of matching what has been posted on the system with a ticker tape of the totals in a particular batch of registrations.

**ABTG: Non-Credit Financial Accounting Numbers (FANS).** This screen allows the user to create and associate a five-character transaction type with the longer string of Financial Accounting Numbers (FANS) in a table. Thus, the user can post payments and other activity efficiently on the student account screen using the five-character code and have it associated with a full string of budget numbers on the student financial file. The next two screens aid the user in finding either a transaction type, or a budget, if one is known but not the other.


**ABIL: "FANS" Financial Accounting Numbers by Transaction Type.** In order to find a budget number associated with a particular transaction type, the user enters a transaction type code, and the screen fills with transactions and associated budgets starting at that point. This is an inquiry-only screen.

**ABIN: "FANS" Financial Accounting Numbers by Fund/Budget.** In order to find a transaction type associated with a particular budget, the user enters a fund and budget, and the screen fills with all budgets and associated transaction types from that starting point. This is an inquiry-only screen.

**VPAR2120: Daily Transaction Activity Report.** This report will be produced daily for each offering unit. It will be sorted by source, and then by teller. It provides detail for each posting and allows each offering unit to reconcile transactions from the previous day.

**VPAR2121: Audit Report of Refunds.** This report will be produced from the transaction logs of refunds requiring an override, and provide information to the auditors on refunds.

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**Billing and Batch Procedures**

**THE DETAILS**

**Bills to students with outstanding balances.**

Bills will be sent to students with outstanding balances, and will be repeated if the account is not paid in full. In general the starting date of the course will determine the effective date for billing activity. Bills will have same general appearance as the student bills now being used for credit, but the color of the printing on the bill is burgundy, rather than blue. Holds will be placed automatically as noted below if the account is not paid.

**Account information.** Bills will show a balance as of one month ago or as of the last bill, whichever is the more recent. Then transactions since that last bill, or in the last month, will be shown. This can be accomplished by balancing every active student account, and if the balance is zero, we put a fake bill date on the system. Thus the system "thinks" it sent a bill on the fake date, and will not show transactions earlier than that date on future bills.

**Billing frequency.** Bills will be sent to students beginning with the first weekend after an outstanding positive balance exists in the account (based on the earliest effective date of any of their courses), and will be repeated every thirty days thereafter, up to and including the billing on the 120th day, if the account is not paid in full. On the 150th day of this process, if no payment has been received, the student account will be shown on the Write-off Report, and no additional billings will take place on that account. The procedures that must then be followed to accomplish the write-off are listed in the section on the Write-off Report below.

**Messages related to billing frequency.** Unique messages will appear on the initial, 30-day, 60-day, 90-day, and 120-day billing cycle. If no payment is received on a given bill, subsequent bills are sent as indicated, with the associated messages.

If new charges occur on the account, but no payments are made, the billing cycle continues uninterrupted, and the corresponding messages are shown. Once a student is in the billing cycle, new
charges do not result in more frequent or additional bills; these new charges simply appear on the next occurrence of the bill in the normal cycle.

If the account is paid in full, no additional bills or statements are sent following that payment.

If partial payments are received, the billing cycle resets itself to the 30-day billing and message for the next bill. Again, if new charges are also occurring while partial payments are being received, the 30-day billing and message will be sent, showing the new charges and partial payments.

**Holds and late charges.** A non-credit registration hold will be automatically placed on the student account (Source = BB, Type = REGN, Reason = NC), and a $10 late charge added, just prior to any 60-day bills. The 60-day message will make reference to the hold having been placed on the student and the $10 late payment charge having been added to the account.

Holds can also be placed on-line manually using the appropriate ARUSH(x) screen. All holds will be set on one and the same file for all credit and non-credit students in ISIS. For non-credit holds placed on-line, we use Source = BU (or other as appropriate to the unit), and Reason = NC.

**Threshold levels.** The purpose of a low threshold on bills is to eliminate nuisance bills to students who have a very small balance remaining on their accounts. In our case, it was agreed that if the account has a balance of less than or equal to $2.00, the billing system would not send a bill after the 30-day billing. In this case, the account should be adjusted manually to remove the charge and set it on the 0731 fund (the general ledger account of accounts receivable for bad debts) using a journal voucher. This is roughly equivalent to a write-off, except the account stays active (not WO) and the student is not turned over to collection. Further, if appropriate, the local offering units can agree to removing such charges manually prior to the 30-day billing if they so desire.

**Bill appearance.** The bill to students should be similar in size and design to the semester bill now being sent to credit students. An 8.5" x 11" single page self-mailer with V-fold will be used. The front of the bill will be designed to include the Penn State logo, and other pre-printed information, such as the address of the University Bursar including a new zip+4, terms, payment instructions, returned item and other pertinent information. In the upper left, the student’s name and address will be shown. To the right, all identification numbers and references will be shown. The center section will include transaction dates and amounts. Messages will appear below the transaction block. There will be a tear-off stub to return with the payment, again repeating the student name, Social Security number, and current balance. On the reverse side of the bill, half of the "V" will be used to support the mailing process, showing the Penn State logo, the return address for the University Bursar, the bulk rate indicia, and a space for the printing of the student name and address. The remainder of the "V" will include another logo and an address correction block directly behind the tear-off stub. The color will be a shade of mauve. A mauve return envelope will also be developed, again showing the new zip+4, to be used by the student to mail back the payment. Members of the Joint Application Design team will interact with Moore Business Forms to achieve the desired bill design and envelope.

**Bills to companies for individual students.**

Bills will be sent to companies for students they are sponsoring in non-credit courses. The bills will be sent to companies having outstanding balances for individual students, beginning with the first weekend--based on the effective date--after a student charge appears on the company file, and continuing at thirty-day intervals thereafter. The bills will identify the students and show the courses and appropriate charges. The bills for companies will be similar to the student bills, using the same paper stock and print color.
**Billing frequency.** Bills will be sent to companies sponsoring individual students beginning with the first weekend after an outstanding positive balance exists in the account (based on the earliest effective date of any of their courses), and will be repeated every thirty days thereafter, up to and including the billing on the 120th day, if the account is not paid in full. On the 150th day of this process, if no payment has been received, the company account will be shown on the Write-off Report, and no additional billings will take place on that account. The procedures that must then be followed to accomplish the write-off are listed in the section on the Write-off Report below.

**Account information.** Bills will show a balance as of one month ago or as of the last bill, whichever is the more recent. Then transactions since that last bill, or in the last month, will be shown. This can be accomplished by balancing every active company account, and if the balance is zero, we put a fake bill date on the system. Thus the system "thinks" it sent a bill on the fake date, and will not show transactions earlier than that date on future bills.

**Messages related to billing frequency.** Unique messages will appear on the initial, 30-day, 60-day, 90-day, and 120-day billing cycle. If no payment is received on a given bill, subsequent bills are sent as indicated, with the associated messages.

If new charges occur on the account, but no payments are made, the billing cycle continues uninterrupted, and the corresponding messages are shown. Once a company is in the billing cycle, new charges for individual students do not result in more frequent or additional bills; these new charges simply appear as transactions on the next occurrence of the bill in the normal cycle.

If the account is paid in full, no additional bills or statements are sent following that payment.

If partial payments are received, the billing cycle resets itself to the 30-day billing and message for the next bill. Again, if new charges are also occurring while partial payments are being received, the 30-day billing and message will be sent, showing the new charges and partial payments.

**Holds and late charges.** Screens and files to support company holds will not be developed in Release #1 of this project. The $10 late charge will be added just prior to the printing of the 60-day bills. The 60-day message will make reference to the late charge having been added to the account.

**Threshold levels.** The purpose of a low threshold on bills is to eliminate nuisance bills to companies who have a very small balance remaining on their accounts. In our case, it was agreed that if the account has a balance of less than or equal to $2.00, the billing system would not send a bill after the 30-day billing. In this case, the account should be adjusted manually to remove the charge and set it on the 0731 fund (the general ledger account of accounts receivable for bad debts) using a journal voucher. This is roughly equivalent to a write-off, except the account stays active (not WHO) and the company is not turned over to collection. Further, if appropriate, the local offering units can agree to removing such charges manually prior to the 30-day billing if they so desire.

**Bill appearance.** The bill to companies sponsoring individual students should be similar in size and design to the bill described above for students. An 8.5" x 11" single page self-mailer with V-fold will be used. The front of the bill will be designed to include the Penn State logo, and other pre-printed information, such as the address of the University Bursar including a new zip+4, terms, payment instructions, returned item and other pertinent information. In the upper left, the company name and address will be printed. To the right, all identification numbers and references will be shown. The center section will include transaction dates and amounts. The transactions will include information about the students being sponsored, their courses, and the associated charges. Messages will appear below the transaction block. There will be a tear-off stub to return with the payment, again repeating the company name, the company ID number, and current balance. On the reverse side of the bill, half of the "V" will be used to support the mailing process, showing the Penn State logo, the return address for the University Bursar, the bulk rate indicia, and a space for the printing of the company name and
address. The remainder of the "V" will include another logo and an address correction block directly behind the tear-off stub. The color will be a shade of mauve. A mauve envelope will also be used, again including the new zip+4, for use by the company in returning the payment to the Bursar. As noted earlier, the same paper stock will be used for all non-credit bills to students and companies; members of the Joint Application Design team will interact with Moore Business Forms to achieve the desired bill design and envelope.

**Bills to companies for memos of agreement and contracts.**

Bills will be sent to companies with whom we write contracts or memos of agreement. The bills will be sent according to the billing schedule of the memo or contract if one was specified, or will default to the begin date of the first course related to that memo or contract. Bills for particular memos of agreement and contracts will be separate from other billing, and balances shown will not reflect other amounts the company may owe us for other contracts, other memos, or individual students. The appearance of the bills will be similar to the student bills as noted in the previous section.

**Billing frequency for contracts and memos of agreement.** There are two categories:

A. No billing schedule was specified on screen ABKC:

Bills will be sent to companies for contracts and memos of agreement with no billing schedule on ABKC beginning with the first weekend after an outstanding positive balance exists in the account (based on the begin date of the first course associated with that contract or memo), and will be repeated every thirty days thereafter, up to and including the billing on the 120th day, if the account is not paid in full. On the 150th day of this process, if no payment has been received, the company account will be shown on the Write-off Report, and no additional billings will take place for that contract or memo of agreement. The procedures that must then be followed to accomplish the write-off are listed in the section on the Write-off Report below.

**Messages related to billing frequency.** Unique messages will appear on the initial, 30-day, 60-day, 90-day, and 120-day billing cycle. If no payment is received on a given bill, subsequent bills are sent as indicated, with the associated messages.

Since separate bills are sent for each memo of agreement, new charges for other activity should not affect the billing cycle for this contract or memo of agreement. If no payments are made, the billing cycle continues uninterrupted, and the corresponding messages are shown.

If the account is paid in full, no additional bills or statements are sent following that payment. The billing system will close that contract or memo of agreement so that the records do not need to be scanned in future billing cycles.

If partial payments are received, the billing cycle resets itself to the 30-day billing and message for the next bill. Subsequent bills against this contract or memo will reflect those payments as transactions and will properly be reflected in the amount still owed for this contract or memo.

**Holds and late charges.** Screens and files to support company holds will not be developed in Release #1 of this project. The $10 late charge will be added just prior to the printing of the 60-day bills. The 60-day message will make reference to the late charge having been added to the account.

B. A billing schedule was provided on screen ABKC:
If a billing schedule was provided on screen ABKC, then we are obligated to bill according to that schedule. The frequency of subsequent bills will be determined by that schedule, at least through the full cycle of dates associated with that contract or memo. Each bill during the cycle will show the project title, the attention line, and the reference line specified on the ABKC screen. If, at the end of the company's agreed-upon billing schedule, no payments have been made or the contract has not been paid in full, the billing cycle described in the previous section is then used to continue to bill the company, with a 30-day, 60-day, 90-day, and 120-day bill being generated as needed until the account is satisfied. At the end of 150 days, the company will appear on the Write-off Report, and no further bills will be generated for that contract or memo of agreement. The procedures that must then be followed to accomplish the write-off are listed in the section on the Write-off Report below.

Messages related to billing frequency. Unique messages will appear on the bills associated with the agreed-upon billing dates. There can be a maximum of six billing dates used on the ABKC screen. Then, if no payment was received or there is a still a balance owed, there will be messages associated with the 30-day, 60-day, 90-day, and 120-day follow-up bills. If no payment is received on a given bill, subsequent bills are sent as indicated, with the associated messages.

Since separate bills are sent for each memo of agreement, new charges for other activity should not affect the billing cycle for this contract or memo of agreement. If no payments are made, the billing cycle continues uninterrupted, and the corresponding messages are shown.

If the account is paid in full, no additional bills or statements are sent following that payment. The billing system will close that contract or memo of agreement so that the records do not need to be scanned in future billing cycles.

If partial payments are received which are less than the agreed-upon amounts during the scheduled billing cycle, the unpaid balance is included on the next bill. Then, if a balance remains after the agreed-upon schedule, the billing cycle begins with a 30-day billing and message for the next bill. Subsequent bills against this contract or memo will reflect those payments as transactions and will properly be reflected in the amount still owed for this contract or memo.

Holds and late charges. Screens and files to support company holds will not be developed in Release #1 of this project. The $10 late charge will be added just prior to the printing of the 60-day bills. The 60-day message will make reference to the late charge having been added to the account.

Threshold levels. The purpose of a low threshold on bills is to eliminate nuisance bills to companies. There should not be many such occurrences since billings will typically be for the larger amounts associated with contracts or memos. However, in the rare instance that the account has a balance of less than or equal to $2.00, the billing system will not send a bill after the 30-day billing. In this case, the account should be adjusted manually to remove the charge and set it on the 0731 fund (the general ledger account of accounts receivable for bad debts) using a journal voucher. This is roughly equivalent to a write-off, except the account stays active (not WO) and the company is not turned over to collection. Further, if appropriate, the local offering units can agree to removing such charges manually prior to the 30-day billing if they so desire.

Bill appearance. The bill to companies for contracts and memos of agreement should be similar in size and design to the bill described above for students. An 8.5” x 11” single page self-mailer with V-fold will be used. An envelope will be developed to be included in the V-fold. The front of the bill will be designed to include the Penn State logo, and other pre-printed information, such as the address of the University Bursar including a new zip+4, terms, payment instructions, returned item and other
pertinent information. In the upper left, the company name and address will be printed. To the right, all identification numbers and references will be shown that were entered on the ABKC screen. The center section will include the title of the project, as well as transaction dates and amounts. We will show payments received since the last billing, and the expected amount of the next payment. Messages will appear below the transaction block. There will be a tear-off stub to return with the payment, again repeating the company name, the company ID number, the contract or memo of agreement number, and the current balance. On the reverse side of the bill, half of the "V" will be used to support the mailing process, showing the Penn State logo, the return address for the University Bursar, the bulk rate indicia, and a space for the printing of the company name and address. The remainder of the "V" will include another logo and an address correction block directly behind the tear-off stub. The color will be a shade of mauve. The new envelope will also be mauve, and will show the Bursar address including the new zip+4. As noted earlier, the same paper stock will be used for all non-credit bills to students and companies; members of the Joint Application Design team will interact with Moore Business Forms to achieve the desired bill design and envelope.

Weekly report to the offering units of non-zero balances.

The finance office at each offering unit needs to be aware of students and companies whose non-credit account balance is not zero. This report will provide the necessary information in a timely manner and permit the appropriate actions to occur promptly to provide good client service.

Frequency and distribution. This report will be run each weekend after the weekend billing and after automatic refunds. The report will be sent to the offering unit's financial officer or designated bursar staff person via Emc².

Accounts to be included in the report. All students having non-credit holds (Reason = NC) and all students and all companies who have received at least the 60-day bill will be included in the report. Students and companies for whom courses have not yet begun, as well as those having only received the initial bill, will not be shown. Companies being billed for memos of agreement who are within their agreed-upon billing schedule will not be shown; again, only those who received at least the 30-day bill will be shown. For those accounts entitled to refunds, all students and companies will be shown.

Sort. The report will break by two-letter provider code within delivery. Then, students will be shown first, sorted alpha by last name, followed by companies sorted alpha by company name.

Information to be shown about each account.

Students:

On the first line, show:

Student name (Last, first, middle)
Social Security number
Account balance
Hold type, source, reason, if any, up to a maximum of two

On the second line, show non-credit billing history, if any, from the previous month, including:

Bill date
Bill type
Bill amount

Companies:

On the first line, show:

Company name
Company ID number
Account balance (note that this may aggregate memos and individuals)

On the second and successive lines, show the previous month's non-credit billing history, if any:

Bill date
Contract or memo number (blank for individuals)
Bill type
Bill amount

In those instances where accounts need intervention of some kind, the financial officer or bursar staff can then use other screens to adjust the account, request a refund, place a hold, or stop billing. Again, it should be noted that refunds must be processed on the appropriate screens for all companies entitled to them, as well as students who did not satisfy the criteria for automatic refunds.
Automatic refunds under certain conditions.

Automatic refunds will be provided to students under certain conditions and do not need to be requested on the ABRN screen developed in Chunk #8.

Students entitled to automatic refunds: Each night the transaction logs will be scanned to identify canceled enrollment records. If a student was canceled from a course, the following additional criteria need to be met for an automatic refund to be generated:

• The payer was the student himself or herself;

• The payment type was check or cash;

• The non-credit account balance equals or exceeds the charge for the canceled course and other associated charges;

• There are no holds of any type against the student;

• There is no outstanding debit balance for credit courses.

If these conditions are met, this capability will generate refunds through the ISIS Accounts Payable, equal to the amount of canceled charges. An appropriate refund record will be set on the student account, and can be viewed on ABAA the following morning.

It should be noted, by virtue of the above criteria, that refunds will NOT be generated automatically for students if fees were paid by a third party. These refunds need to be generated on ABRN (Non-Credit Refund Request Screen), or ABKR (Company/Sponsor Refund Request Screen). Since the system provides the automatic refunds by scanning the transaction logs for canceled classes, those students not entitled to an automatic refund (e.g., because they paid by credit card, or because a third party paid) will be listed on a separate report in order to facilitate rapid refunding to all students and third-party payers.

Weekly activity chart (summarizes daily activity).

A weekly chart will be provided to each offering unit to summarize daily totals by payment type for the previous week. The totals should balance with each of the totals by type as listed in the daily reports to the offering units specified in Chunk #8.

<table>
<thead>
<tr>
<th>WEEKLY ACTIVITY ON NON-CREDIT STUDENT ACCOUNTS</th>
<th>SOURCE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEEK:</td>
<td>BEGINNING BALANCE:</td>
</tr>
<tr>
<td>CASH</td>
<td>SAT</td>
</tr>
<tr>
<td>CHECK</td>
<td></td>
</tr>
<tr>
<td>C C</td>
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<td>IDT</td>
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<tr>
<td>REDEP</td>
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</tr>
<tr>
<td>REFUND</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
</tbody>
</table>
The report will be sorted and distributed to each offering unit, with a grand total report for the University Bursar.

The weekly report will reflect error corrections to daily reports that have happened during the previous week.

**Write-off Report.**

A report will be generated on the 150th day billing cycle for the bursar identifying accounts that are in write-off situations. Based on the information provided, the additional activity to the accounts to accomplish the write-off must be done on the appropriate screens; other than generating the report itself, nothing is done to the accounts automatically.

The write-off report will show the date of last activity, and will identify each student or company, the student or company ID, and the amount.

**Procedure for accomplishing the write-off after receiving the report:**

- Go to screen ABAA (or ABKA for companies), use a special TXN ID to credit the student account for the amount to be written off.
- Go to screen ABMN (or ABKN for companies), and change the account status to WO.
- Go to screen ARUSHB for students and add the additional hold for the transcript. There is no company hold in Release #1.
- Set charges of the 0731 fund (the general ledger account for accounts receivable for bad debts).
- Send to collection agency if the amount exceeds the threshold for the collection agency.
- If the agency recovers, we change the status back to active.

**Journal Voucher Activity Report.**

A report will be provided to each offering unit of all journal voucher activity, reflecting the transfer of funds from ISIS to IBIS. It is anticipated that information on the student and company financial files will be transferred weekly to the University's financial accounting system on IBIS.

**Screen ABBN: Billing history for students.**

**Purpose.** This screen will provide information about the history of non-credit student bills, similar to ABBH which is now being used for credit students. This screen allows the user to answer questions from students regarding bills they received or should have received.

**Use of the Screen.** The user will "skip" to the student billing history records using the 'S' in the action field and the student's Social Security Number. Upon using the "Enter" key, the student's name (last first middle compressed to 30 characters) will appear at the top of the screen. Each bill will be shown and numbered on the screen. For each line, the following detail will be shown:

- Address indicator.
• Bill type.
• Bill date.
• Amount of that bill.
• Requester ID (will either indicate a system-generated batch billing, or the requester ID if it was an on-line requested bill).

At the bottom of the transaction, the user can enter a selection number and, upon depressing "Enter", can see the address to which that bill was sent.

Screen ABKB: Billing history for companies.

Purpose. A screen to review billing history for companies will be available, and will be similar to the screen ABBH for students. It is an excellent screen to obtain information if the company inquires about a bill that was received.

Use of the Screen. The user will "skip" to the company billing history records using the 'S' in the action field and the company's ID number. Upon using the "Enter" key, the company's name will appear at the top of the screen. Each bill will be shown and numbered on the screen. For each line, the following detail will be shown:

• Contract or memo number if that bill was for a contract or memo (otherwise blank).
• Address indicator.
• Bill type.
• Bill date.
• Amount of that bill.
• Requestor ID (will either indicate a system-generated batch billing, or the requester ID if it was an on-line requested bill).

At the bottom of the transaction, the user can enter a selection number and, upon depressing "Enter", can see the address to which that bill was sent.

Screen ABBT: Stop billing for students.

Purpose. This screen will be used to stop non-credit billing for students. This screen will be similar to ABBS for credit students. It was decided not to modify ABBS for non-credit because we wanted to maintain the various options of allowing some bills, but not necessarily all, to be stopped. Therefore, this screen will be used to stop only the non-credit bill.

Use of the screen. The user will "skip" to the student using the 'S' in the action field and the student's Social Security Number. Upon using the "Enter" key, the student's name (last first middle compressed to 30 characters) will appear at the top of the screen. The user then changes the ACTN field to 'A', and enters a code and begin date and end date for the bills to be stopped. The valid codes are:
NC for a regular non-credit stop bill

WN for stop bill and do not put the student on the write-off report

The begin and end dates must be consecutive, and the window between the begin and end dates cannot exceed 120 days.

**Screen ABKS: Stop billing for companies.**

A screen to stop billing for companies will be available, for use when a situation arises that companies should not receive a bill that would otherwise be sent from the system. The screen will be similar to ABBS for students. This screen will only be used to stop billing for individual students, not contracts and memos. If bills related to contracts and memos should likewise be stopped, the appropriate changes should be made on the billing schedule of the ABKC screen.

**Use of the screen.** The user will "skip" to the company using the 'S' in the action field and the company ID. Upon using the "Enter" key, the company name will appear at the top of the screen. The user then changes the ACTN field to 'A', and enters a code and begin date and end date for the bills to be stopped. The valid codes are:

- NC for a regular non-credit stop bill
- WN for stop bill and do not put the company on the write-off report

The begin and end dates must be consecutive, and the window between the begin and end dates cannot exceed 120 days.

**Screen ABBQ: On request billing for students.**

A new screen will be developed, similar to ABBR, to request billing for students. The screen will permit entering a "start bill" date so the activity on the account from that date forward can be shown.

**Use of the screen.** The user will "skip" to the student using the 'S' in the action field and the student's Social Security Number. Upon using the "Enter" key, the student's name (last first middle compressed to 30 characters) will appear at the top of the screen. The user then changes the ACTN field to 'A', and enters a bill type (NC = non-credit) and a "start bill" date. The start date must be less than or equal to today. If these checks are satisfied, the user will be invited to depress the PF12 to request the bill.

The bill will then be generated by the system to show all transactions from the "start bill" date forward. The system generates a bill that "looks like" what the bill would have ordinarily looked like if the bill had been automatically generated from the system, except it will show all transactions from the start date forward to today.
**Screen ABKT: On request billing for companies.**

Likewise, a screen will be available to instruct the system to send a bill to a company, similar to screen ABBR for students. The screen can be used to request billing for individuals that the company is sponsoring and for which charges were set on the company financial file, or for specific contracts and memos of agreement. The screen will permit entering a "start bill" date and an "end date" so the bill will only reflect transactions between the two dates.

**Use of the screen.** The user will "skip" to the company using the 'S' in the action field and the company ID. Upon using the "Enter" key, the company name will appear at the top of the screen. The user then changes the ACTN field to 'A', and enters a bill type (NC = non-credit) and a "start bill" date. If no "end date" is entered, it will default to today's date. If no contract or memo ID is entered, the system will assume the bill is for individual students being sponsored by that company. If a contract or memo ID is entered, the system will check the contract file to be sure there is a match of an active contract or memo with that company. Both ID's must match. If so, the user will be invited to use the PF12 key to request the bill.

The bill will then be generated by the system to show transactions between the two dates. The system generates a bill that "looks like" what the bill would have ordinarily looked like if it had been automatically generated from the system.

**Screen ABMN: Update account status for students.**

This screen serves the very simple purpose of allowing the user to change the account status of a non-credit student. Typically, this screen will be used to change the account in and out of write-off status.

**Use of the screen.**

**Screen ABKN: Update account status for companies.**

As above, this screen allows the company account status to be changed, and will typically be used in write-off situations.

**Screen ABKM: Update account status for contracts & memos.**

The primary purpose of this screen will be to change the account status of a specific contract or memo of agreement from closed back to active.
History. Over the years, non-credit records have been retained in a variety of ways at Penn State. With the goal of being able to provide a transcript-like document or verification of enrollment to any non-credit registrant, the Office of the University Registrar maintains non-credit records. Depending on the level of automation available at the time, the records were maintained on transparencies, paper, microfilm, microfiche, or magnetic tape. More recently they have been maintained on File 254 in the Integrated Student Information System (ISIS), although File 254 is not actually integrated with other ISIS files.

Prior to 1976, transcript records were kept on paper and periodically microfilmed. Beginning in 1976, with the wide acceptance of the Continuing Education Unit (CEU) as the non-credit educational value measurement, CEU records began to be kept on computer cards similar to the computer cards used in credit at the time. These computer-card records were captured on magnetic tape periodically, and are available and accessible today from that medium, as well as from microfiche. In the late 1980's, the Commonwealth Education System developed ACCESS, a mini-computer based system that was originally running in Keller Building. In 1990, a weekly magnetic tape file transfer from ACCESS to File 254 in ISIS was established as the way in which all Penn State non-credit, graded CEU records were electronically loaded into the OAS mainframe.

ACCESS today is actually several distinct but similar systems: ACCESS-CC, ACCESS-CE, and ACCESS-BO. ACCESS-CC serves the needs of Conferences and Institutes and Penn State Scanticon in Continuing and Distance Education. Its most special feature is the capability to create and maintain events for conferences. ACCESS-CE serves all other entities of C&DE, such as the State College office, Monroeville, and Williamsport. The host for ACCESS-CC and ACCESS-CE is the Library VAX. ACCESS-BO serves the CES, and operates on a microVAX in Susan Building.

In the mid-1980's, the CES also developed the SOLO system to serve the needs of Independent Learning. It is likewise currently running on the Library VAX. Its special features include lesson tracking of individual registrants, ordering and inventory maintenance of books and supplies for Independent Learning registrants, and paying faculty who grade the lessons. This system does not include student bursaring. At the present time, no non-credit records from SOLO are placed on ISIS, and the credit records are entered manually by staff assistants in the University Registrar's office after paper documents are sent there by Independent Learning staff.

Goals of this chunk. The goals of this chunk are to provide a capability for units that need to continue to use their existing systems (because Release #1 of the NCRR Project will not provide them with all the functionality they require) to transfer data electronically into ISIS, and to capture electronically and integrate as many old non-credit records as possible. Accordingly, there are four major groupings of tasks in this chunk of the project:

Provide daily file transfers from ACCESS-CC and SOLO into ISIS. It is expected that ACCESS-CE and ACCESS-BO can be discontinued after summer, 1995, and the units currently relying on those systems can use ISIS for non-credit registration and bursar activity. In C&DE, Conferences and Institutes (both campus-based conferences and Penn State Scanticon) will continue to use ACCESS-CC; and Distance Education will continue to use
SOLO. Therefore, to avoid duplicate data entry, a daily file transfer will occur to take ACCESS-CC data and both credit and non-credit SOLO data into ISIS. This file transfer will use the University's data backbone and the latest file transfer protocols. Programs have to be written in C&DE to capture information from new and changed transactions each day and include the appropriate data elements in the file transfer. Programs must also be written by the NCRR staff to capture the incoming file from ACCESS-CC and SOLO, and place the data in the appropriate ISIS files. As a result of this file transfer capability, by the start of business the next working day, ISIS will be as up-to-date as ACCESS and SOLO information, minus those records that do not pass the edit routines of the file transfer program.

Provide bursaring capability--credit and non-credit--for Distance Education in ISIS after the daily file transfer. Currently, SOLO does not provide a bursar capability for students taking Distance Education courses, and student accounts need to be maintained manually. Frequently students do not send in the correct payment due to the many special charges associated with Distance Education enrollments, and bills and refunds are cumbersome at best in this environment. A new screen, ARUCND, is being developed to permit Distance Education to create their TCM's for their credit courses, and, similar in function to non-credit, this screen will allow the setting of many charges (and discounts) with each section. After the file transfer occurs each night, all of the charges associated with the course will be set on the students' (non-credit) accounts and then payments can be posted accordingly. Since there is currently no bursar activity occurring in ISIS for Independent Learning credit students, no existing financial programming had to be revisited as a result of this new capability.

Unbundling File 254 and integrating the data in existing (or new) ISIS files. Since 1990, ACCESS data has been loaded onto File 254 in ISIS via a weekly tape file transfer. The records include student, course, and grade information for every enrollment in a CEU course. File 254 data is not integrated into the remainder of ISIS, and the data coming in on the weekly tape file is not checked against other ISIS data. The goal of this activity, then, is:

- to refresh the 254 file with the best possible data from all ACCESS units
- to report on discrepancies--there are many--between the data on the 254 file and other ISIS files (like 217, the "name" file);
- to provide a screen to allow rapid selection of student name, gender and birth date to compare and fix discrepancies between ISIS and ACCESS/f254 data;
- to then unbundle the File 254 data, and place that data on other appropriate ISIS files (courses on the UCM, names, addresses, transcript information, etc.);
- to provide a capability for the remainder of Spring Semester, 1995, to capture all ACCESS data as a file transfer similar to that which is described above rather than the weekly tape file onto File 254.

Capture student and course information for RIP records from 1976-1990 from the magnetic tape file. The non-credit registrations from 1976 - 1990 are stored on a magnetic tape. These records do not contain course descriptions or long titles, so UCM records will first need to be created from a paper listing. Then the following actions can be taken, in similar sequence to the actions in the section above:

- The old tape records should be placed on a temporary ISIS file;
- A report should be run identifying discrepancies between ISIS data and the data from this file;
• The screen developed above to provide rapid selection and fixing of possible discrepancies will be used;

• The temporary ISIS file should then be unbundled, with each data element being placed on the correct file. Students having at least one RIP course will have all their records transferred to ISIS.
GLOSSARY

Active Course - A course on the University Course Master that may currently be offered because the semester/year of the section on the TCM is within the beginning date and the ending date established by the college dean.

ACTN - The abbreviation for the word ACTION. It is a one-byte code that is used to indicate which process is being requested for a screen. The action codes may vary from screen to screen.

Add - The term used to define the process of adding a course, student or charge to a file.

Additional Charge Status - The status of additional charges that can be either set or removed using screen ARURNI. The status can be either ACTIVE, DROP or WAIT.

ADIS - (Alumni Development Information System) - A sub-system of the AIS which houses the records of former students, and current and former companies.

AIS - (Academic Information System) - The information system of the University. It is composed of ISIS, IBIS and ADIS, and is maintained by the Office of Administrative Systems.

Area of Interest - The course area that a student is interested in either by virtue of having taken a course in the course area, or by contacting the University and making the interest known. The data fields that are maintained are the course abbreviation, the provider and delivery of the course, and the semester when the course was taken. There may be as many as four occurrences.

AUD (Audience) - The segment of the population that is targeted for a course offering.

AUD DIV (Audience Division) - General areas of employment where a course is being targeted.

AUD SUB DIV (Audience Sub-division) - A specific area of employment where a course is being targeted.

Batch - Refers to a computer program that is run for a group of students, courses or financial records, usually at night or during the weekend.

Billing Address - The address where the bill or refund will be sent, when the student has indicated that the bill should go to an address other than her/his home or work address.

Business Address - The address of a company in the company file.

Cancel - The process of deactivating a registration on ISIS. All charges that were incurred when the student was registered, are removed when a registration is canceled.

CC - An abbreviation that represents CREDIT CARD.

CC/CHECK/PYMT# - A field name that labels the field where the credit card number, the check number or the cash receipt number is entered on screen ABAA.

Certificate - An award presented by the University to a student who has successfully completed one or more courses in a specific course area. Certificates are authorized by one of the academic colleges, and are distributed through one of the offering units.
Cheshire Label - The term used to describe the type of mailing label that may be requested for a group of students or a group of companies. It will contain the names and addresses of a selected sub-set of students from a certain offering unit.

Chunk - A segment of the NCRR Project.

CIP Code - A numeric code used by the federal government that appears on the University Course Master. It is the abbreviation for Classification of Instructional Program, and divides academic disciplines in a standard fashion among all institutions to allow the government to compile standardized reports.

Class Limit - A number set by the course administrator that represents the maximum number of students that can be registered for a course section.

Code-set - A set of codes in ISIS that is linked by a code-set name. One of the values of a code-set may be entered into a certain data field using an ISIS screen.

College Code - A two-byte alphabetic code that represents one of the 13 colleges of the University.

Common Grade - A field on screen ARUCNG that can be used to enter a grade that will then be assigned to all of the students in the section. It is usually used to assign the "S" grades.

Company - A business or other place of employment that is maintained on the ISIS Company file.

Company Account - The financial account of a company that accepts charges and payments, and is used to keep track of the financial account of a company that the University does business with.

Company ID - A nine-byte numeric field that uniquely identifies the company. It is assigned by the system when a new company is created using screen ARUKM.

COM-PASS menu - The main menu to the OAS computer, where the operator chooses one of the program services that he/she is authorized to use.

Contract - An agreement that is signed by a representative of the company and the University, which outlines the content and the financial terms of the instruction that the University will give.

Course - The generic term used to describe a course, a conference, an independent learning offering, or other offerings of the University.

Course Description - The complete description of the course, that is usually written by the course proposer, and is always finally approved by the college dean. It is permanently saved in the UCM, and may have no more than 624 bytes.

Course Key - The fields that are required to access a record on ISIS. For example, when accessing the TCM, the course key is SEM OFFRD, COURSE ABBREV & NUMBER, SECT, prov/LOC AND DEL.

Course Proposal - An idea for a course that is created by an offering unit, and sent to a college for review of the academic content and validity of the credentials of the proposed instructor. If approved by the college, the course is entered into the University Course Master.
Course Status - All students that are or were registered for a course have a course status. If registered, the status is REGIST; if on the waiting list, the status is WAIT; if registered and then dropped, the status is DROP; or if registered and then canceled, the status is CANADM.

Course Title - The full title of the course, that is usually suggested by the course proposer, and is always finally approved by the college dean. It is permanently saved in the UCM, and may have no more than 150 bytes.

Course Variables - A five-byte abbreviation from a code-set on screen ARUCNT that represent registration options that do not have additional charges.

Create - The term used when a new record is added to the course, section, student, enrollment, transcript, or company file. The Action of "A" is used to "A"dd or create a record to the appropriate file.

Cursor - The white dot shown on all ISIS screens that shows the operator where the next key stroke will be entered. Pressing the TAB key will move the cursor from the first space of each input field on the screen to the next input field on the screen.

Cycle Date - The date shown on all of the financial screens that represents the date that the transaction was entered into ISIS.

DCE - The abbreviation of the title of the Director of Continuing Education.

Delete - An action available on most of the create and update screens that will allow the operator to completely remove a record from a file. The delete function should only be used to remove an erroneously keyed record. It should not be used to drop or cancel a legitimate student from the course or file.

Delivery Code - A code-set that identifies all of the delivery methods that are available in The Commonwealth Education System, Continuing and Distance Education, and in the colleges. The legitimate codes and their meaning are: A = All colleges except Hershey; D = Distance Education; H = Hershey; S = CES; E = Monroeville, State College and Williamsport Centers; and X = The Conference Center.

Department Code - A five-byte code that represents an academic department in a college.

Drop - The term used to define the process of adding a course, student or charge to a file.

EASY form - An electronic form in the IBIS sub-system that allows an operator to create and submit a pre-designed form on to one of several predetermined destinations for final approval. Non-credit course proposals can be sent to the appropriate college using EASY form NCRD. This form replaces the need for the Form 84 and the Form 63.

Effective Date - It is the date that a financial transaction is to be effective. When a transaction is entered, the system defaults to "today's date", but the operator may change the effective date to the appropriate date, if "today's date" is incorrect.

EMC2 - This is the electronic mail system used by the Office of Administrative Systems. Several routine reports that are run in batch in OAS, result in the report being routed to the mailbox of the appropriate individual at the offering unit.

ENRL CNT - (Enrollment Count) - The actual enrollments in a section of a course.
ENRL EXP - (Enrollment Expected) - The expected enrollment of a section of a course. Typically, the number is used for budgetary purposes.

ENRL MAX - (Enrollment Maximum) - The class limit, or the maximum number of students that can be enrolled in a section of a course.

ENRL MIN - (Enrollment Minimum) - The least number of students must enroll in order to hold the class. Typically, it is the number of enrollments that must occur for the class to break even financially.

Enrollment - The entity created by a student registering for a specific section of a course.

ENTER - The key on the computer keyboard that is used in ISIS for many functions, but is most often used to request that the field values be edited, prior to pressing PF12 to actually update the record.

Error Message - A message from the system that will be displayed at either the top or bottom of the screen if either the ENTER key or PF12 is pressed and the function that is requested does not pass the edits built into the system. The data or the function that was requested incorrectly, will have to be corrected before the operator may proceed. The operator has the option of pressing PF1 at any time to have the system display the "Help" documentation.

EST ENRL -(Estimated Enrollment) - A field that is found on the ARUCNT screen that allows the registrar to enter an estimated enrollment. It is used for those offerings where students are not individually registered.

Ethnic Code - A code used by the federal government to show a student's ethnic background. In ISIS, the different ethnic backgrounds are associated with one of the letters A through I, which is entered using screen ARUSNP.

EVM Type - A one-byte alphabetic field that describes the Educational Value Measurement type that is appropriate for a given course. The determination of EVM type is made by the college dean.

FANS - The Financial Accounting Numbering System. It gives the offering unit flexibility in determining how to separate their income and expenses in a way that serves their individual purposes. The seven fields of FANS are Budget, Fund, Object, Sub-Object, Cost Center, Activity and Department Free Space. Initially, the only fields that are required to be used are Budget, Fund and Object. In the first release of NCRR/ISIS, the Department Free Space will carry the semester/year and schedule number of the course.

Fast Path - With the cursor in the field at the bottom-left of any ISIS screen, the operator can enter a screen path (Example ARIRS) and press ENTER, and the system will go directly to the screen selected.

Field - A section of an ISIS screen that either is used to enter new data, or displays existing data on the screen.

Financial Officer - The person at an offering unit that is responsible for all of the financial management at an offering unit. This person sets all of the course charges, and reviews all of the financial reports that are used to monitor the money at an offering unit.

Forfeit Date - Entered on the ARUCNT screen if the date of the forfeiture of the course fee is earlier than the beginning date of the course. Otherwise, the course fee is forfeited (no course fee refund) on the first day of classes of the course section.
Grade Type - A one-byte alphabetical field on screen ARUCNT that describes the type of grade that will be used for the section. The choices are "Quality" grades (A - F), "Participation" grades (S or X) or "No grade given" (N). The college determines which of the three types may be used for a given course and enters the appropriate code on the University Course Master.

Group Fee - A fee paid by a company according to a contract or Memo of Agreement that covers the course fee for the students who enroll. A group fee indicator will be entered on the ARUCNT screen provided there is a contract or memo entered in the Company File.

Hard Copy - A term used to describe a printed report from the system.

Help Screen - A series of screen displays that an operator may see by pressing the PF1 key at anytime, and display the documentation that has been prepared for the screen.

Hold - A process that allows the offering unit to prevent a student from registering for a course or from obtaining a transcript of her/his previous course work. "Holds" are entered using screen ARUSHC, and affect course work or transcript production in both the credit and non-credit environments.

Home Address - The address given by the student indicating where he/she lives on a permanent basis. Bills, grades and promotional material would normally be sent to this address.

IAAP Screen - A screen in the IBIS system that links faculty with the courses that they are qualified to teach. There is currently no application in AIS to link ISIS screens to the IAAP screen to check to see if faculty listed in ISIS are approved to teach a certain class.

IBIS (Integrated Business Information System) - The business and financial sub-system of AIS.

IDT - (Interdepartmental Transfer) - A form used within the University to transfer funds from one budget to another. Non-credit courses can be paid for by a department using an IDT.

Inactive Course - A course on the University Course Master that is no longer permitted to be offered, due to the expiration of the time limit for offering, that was determined by the college.

Individual Fee - A fee paid by an individual to cover the cost of the course. An Individual Fee indicator will be entered on the ARUCNT screen when the section is created on the TCM, and on the ARURNI screen when the student registers.

Inquiry - The process of viewing a record on a screen, as opposed to having update capability to a screen. Most users can have "inquiry" to many screens, but only the appropriate users have update capability.

Instruction Type - A three-byte alphabetical code that is entered on screen ARUCNT by the registrar that indicates the primary teaching method used in the delivery of the course. Examples are LEC for lecture; WRK for a workshop, etc.

ISIS - (Integrated Student Information System) - The student sub-system of AIS.

JAD - (Joint Application Design) - The method used by the NCRR Project members to set the specifications for the NCRR "Chunks". The members of the team were representatives from the primary user groups in CES, C & DE, and from the central administrative offices.

Left Justified - A technical term used to explain that if the data in the data field is less characters than the field length, the data begins in the first byte of the field.
Local Address - The temporary living address of a student. It usually refers to a residence hall or apartment where a student is living while attending the University. This address is not routinely collected for students that are enrolled for non-credit courses.

Location Code - This is the third, fourth and fifth bytes of the five byte Provider/Location code. It represents a specific city or place where the instruction actually occurs. All non-credit courses offered in ISIS must have the full five byte code associated with the course on the TCM.

Mailing Address - An address collected by the Independent Learning Office that serves as a temporary address to mail lessons to the place where the student is temporarily living. It is not recorded in ISIS.

Memo of Agreement - An agreement that is signed by a representative of the company and the University, which outlines the content and the financial terms of the instruction that the University will give.

Menu - A screen on ISIS or IBIS that shows the operator what the options are to select the next level of screens in the hierarchy.

NCRD form - An electronic form in the EASY package in IBIS that is used to initiate a course proposal to the college. The form originates at an offering unit, is approved by the Director of Continuing Education, and is forwarded on to the appropriate college dean for final approval. When approved by the dean, it is automatically moved into ISIS, and is ready to be offered by any offering unit.

NCRR (Non-credit Registration and Records) - The name given to the project to integrate the non-credit registration and records processes into the ISIS system.

NP - A code used on screen ABAA that means "no post". It refers to a transaction such as a refund check that is already posted on the accounting files.

Offering Unit - The generic term used to describe each of the campuses, centers, colleges, conference centers and distance learning units that offer non-credit courses. Each offering unit is identified by a two byte provider code, and a one byte delivery code.

Official Transcript - A certified copy of a student's academic record, issued exclusively by the Office of the University Registrar. Separate records may exist for a student that include Undergraduate, Graduate, Medical and Non-Credit. There is a $4 fee for the service of preparing and sending each transcript. Information regarding the ordering of an official transcript is available by calling the Registrar Information Service, 24 hours a day at (814) 863-8500.

On-Line - The term used to describe the act of viewing or updating information at a computer terminal.

Operator - The person who is actively viewing or updating a screen using a computer terminal.

Password - A code that is entered in conjunction with a user's USERID and SECURID card each time access is attempted to the OAS computer. If one of the three codes is incorrect, access is denied. The password is determined by the user, and must be changed every 75 days.

"Pop-up" Window - (See Window)

Post Date - The date entered when the financial transaction represents a charge for a previous semester, but the money is deposited into the current semester.
**Primary College** - If a course is co-offered by more than one college, the primary college is the one that provides the largest percentage of the instruction, and the one who enters the course into the UCM.

**Program** - The term used to describe courses that have content in a particular field, such as Real Estate or Business Law.

**Provider Code** - A two-byte alphabetic code that represents an offering unit of non-credit courses, such as the campuses, the centers and the offices in Continuing and Distance Education.

**PROV/LOC** - The abbreviation for Provider/Location. It is a five-byte field which has the provider code as the first two bytes, and the location code as the last three bytes. All non-credit course have a PROV/LOC code.

? - (Question Mark) - If the operator is unsure of the appropriate value that is being requested in a certain field, she/he may enter the "?" in the first byte of the field and the system will display either the appropriate values in a "window", or it will prompt the operator to enter a specific value or code.

**Quick Scan** - The term used to describe a screen in ISIS that allows the operator to enter partial information about courses, companies or students, and have the system display those records that share those values that are entered. It is the way of locating a course, a student or a company without having to know the identification in advance.

**Required Field** - A pre-defined place on a screen that must be completed with the appropriate value by the operator in order to update the screen. An operator unsure of the appropriate value may enter a "?" in the first byte of the required field, and request that the system show him/her either the appropriate values or be prompted to enter a specific value or code.

**RESPON** - A data field on screen ABAG, that has a "Y" indicator set if an item (usually a check that has been returned from a bank due to non-sufficient funds) was returned and it was the fault of the student. The operator has the ability to change the value to an "N" if it is determined that it was not the student's fault or RESPONSIBILITY. Having the "Y" flag set will incur a $10 charge to the student.

**Returned Item** - The term used to describe a check that had been written by a student to pay for a course that was returned from the bank due to insufficient funds in the student's account.

**RIP Course** - (Repetitive Informal Program) - A term used to describe a course that is offered with the same content from term to term and at any location.

**RMDS** - (Report Management Distribution System) - A program service available in OAS that allows approved users to access, view and print reports or specific pages of reports at the OAS printer, or at the users local printer. All of the approved non-credit courses in the UCM file will be available to be viewed and/or printer by the registrar or other appropriate user at an offering unit or a college.

**Schedule Number** - A six-byte numeric code that is assigned by the system when a section of a course is created on the TCM file. It is used to associate the student with the course that she/he is registering for as a part of the registration process on screen ARURNI. When associated with a semester/year, it is a permanent, unique identifier of the course section.

**Search** - The term used to describe a user looking at or "skipping" to a screen or data field, as opposed to "updating" a data field. Depending on the individual user's needs, she/he may have either update or
access (view) capability. On screen ARURNI, the "search" action is used to see the second page of the screen.

**Search Code** - Any alphabetical character that when entered in the Search Code field in a "Window" of an ISIS screen, will cause the system to display the next code-set value that follows alphabetically.

**Section** - An offering of a course that has been previously approved by the appropriate college. Each section is created on the Term Course Master (TCM) using screen ARUCNT, and must have a valid semester/year, course, provider, location and delivery.

**Section Lock** - The process of preventing students from registering for a specific section of a course. The college that sponsors the course may use screen ARUCNL to "lock" the registration process by entering a "Y" in the LOCKED field. When the reason for the lock has been resolved, the college then must go back to the screen and enter an "N" in the LOCKED field.

**SECURID** - A credit card size card that is issued by OAS that has an LCD readout of 6-digit number that is associated with the USERID and PASSWORD of the person who is attempting to sign-on to the OAS computer. If either of the three codes is not properly entered, access to the OAS computer will be denied.

**Semester** - The term used to describe one of the three time measurements in ISIS wherein students are registered and Money recorded. All courses must be offered as a fall, spring or summer semester. Offering units will determine the appropriate semester by using the following rules. Typically the course is labeled as the semester when the course begin date falls. If a course ends before June 15, it must be listed as a spring semester or a semester from earlier in the fiscal year. If the course begins after June 30, it must listed as a summer course or another semester in that fiscal year.

**Short Title** - The abbreviated title of a course. It is the title that will be recorded on the student's permanent transcript. The actual wording can be entered into ISIS via screen ARUCNU by the college dean, or by the offering unit using EASY form NCRD, and is limited to 40 bytes.

**Skip** - The term used to describe the "search" or "skip" to a record using an ISIS screen. If the record is found, the operator then must enter the appropriate change code to update the record, or would use the "A"dd action code to create a record, if none exists.

**Sponsor** - The term that is used to describe an entity or person who pays the charges for a student. The "Company" file and the "Company/Sponsor" names are used synonymously.

**SRC** - The abbreviation used on many of the financial screens that stands for "Source". It is the entity or offering unit that originates the financial action, such as the Bursar or a campus.

**Student Account** - The financial record of a student on ISIS. All charges, payments and financial history is recorded and available for authorized users.

**Student ID** - The social security number of a current or former student in ISIS. If the social security is not known, a "temporary" or alternate number can be assigned by the system using screen ARUSNP.

**Student System Master Menu** - The menu screen that appears when the operator presses ADMIN MENUS from the COM-PASS screen. The operator will select which sub-system in ISIS (Bursar, Academic Records, Housing, etc.) she/he wants to access from this screen.

**TCM (Term Course Master)** - The file in ISIS that is used to define a section of a course. All pertinent academic and financial course data are entered on screens ARUCNT and ABTN.
"Toggle" - The term used to describe the process of moving from one pre-defined screen to another within ISIS. The PF9 key is used, and provides the same function as the "fast path". The system will then allow the operator to press PF9 from the second screen, and the system will return the operator to the original screen.

Transaction Log - A computer record of update transactions from an ISIS screen, that may later be counted or displayed in a report.

Transaction Type - (TXN TYPE) - A three-part code that is used on financial screens to "process", "transaction ID", and "description" of a financial transaction. There are actually two versions of the same code: a short version (2-5-3) that is used to enter the type on screen ABAA; and an expanded version (5-13-5) that has a more readable format.

Transcript - The academic record of a current or former student that is maintained and distributed exclusively by the Office of the University Registrar. Four types of records may exist for a student depending on the level of courses taken (undergraduate, graduate, medical or non-credit). Official transcripts are printed on special security forms, have the imprint of the University seal, and are signed by the University Registrar.

Type - A four-byte field on ABAA and other financial screens that indicates whether the payment was cash, check, credit card, or IDT.

UCM (University Course Master) - The file in ISIS that is used to describe a course. The course data for non-credit courses is maintained by the college dean that offers the course. Course proposals normally originate at an offering unit, and are sent to the college dean for final approval. The file is the permanent record of all courses ever offered by the University.

Unit - A generic term used to describe the type of non-credit course that is being offered. Examples include the Continuing Education UNIT, the Carnegie UNIT, etc. The college dean determines the appropriate type and number of units for a course that is offered in her/his college.

Unofficial Transcript - An internal working copy of the student's academic record. It is printed on plain paper from printers at a college office or registrar's office of an offering unit.

Update - The term used to describe the process of adding or changing the record on a student, course, company or financial file in ISIS. All updates in NCRR/ISIS are initiated by pressing PF12.

User - An operator of a screen, or a person who enters or receives data from ISIS.

USERID - The 8-byte field that shows the unique identifier of each person who uses the OAS computer. It is usually a three-byte alphabetical code (the person's initials), followed by a one or two-byte number, such as ABC1. All ISIS users must have a USERID and a PASSWORD to sign on the OAS computer. Most users also have a SECURID card with an LCD readout, that is also required.

Waiting List - A computer list that can be maintained using the registration screen (ARURNI). It allows a student to be added to a list of potential registrants for a given section, usually because the class limit has already been reached.

Warning Message - A message from the system that will be displayed at either the top or bottom of the screen after pressing the ENTER or PF12 key if a function is requested that does not pass the edits built into the system. The operator may choose to note the message and move on to the next field, if appropriate, because correction of the warning condition is not required.
**Window** - A term used to describe a "boxed" message that will appear on a screen to show the operator a list of the field values that may be entered into a specific data field. The operator can choose one of the values, or may choose to exit the "window". In either case, the cursor is then returned to the original position on the main screen.

**Work Address** - The address that the student gives, usually on a registration form, that represents her/his work address. Work addresses are not normally collected for students taking resident instruction courses, but are maintained for students taking non-credit courses, or credit courses via Continuing and Distance Education, or via the Conference Center.

**X-Code USERID** - An identifier used on EASY form NCRD to indicate which college will approve a course proposal. If the DCE wants to send the course proposal to the College of Education, for example, the X-Code USERID would be XED1. Having the code to use, allows a DCE, or other course proposer to send the proposal to the proper college without having to know the actual USERID of the person at the college. Likewise, it allows more than one person at the college to have access to course proposals that are arriving.
PF KEY FUNCTIONS

All of the screens that have been created to support the Non-credit Registration and Records system have been developed with common uses of the various PF keys. The following is an explanation for each:

PF1 - Pressing PF1 while using any of the ISIS/NCRR screens will cause the HELP INFORMATION to appear for that screen. Section 1 of "HELP" is the purpose of the screen; section 2 shows the procedures that are used to view or update the record; section 3 is a listing of the field definitions; section 4 explains the PF functions that are used; section 5 explains any timing considerations that may effect the operation of the screen; and section 6 is a listing of all of the operator messages that are used during the operation of the screen. The message codes are the screen path name and a sequential number.

PF2 - Pressing PF2 while in the menu tables will cause the previous menu screen to appear.

PF3 - Pressing PF3 while in the menu tables will cause the first STUDENT SYSTEM MASTER MENU to appear.

PF4 - Pressing PF4 while in the menu table will cause the COM-PASS MENU to appear.

PF5 - Used in screens ARUSNP to assign "temporary" student ID number to a student; and in screen ARUKM to assign a new Company ID in ISIS

PF7 - If the operator has a screen displayed that has more than one page, pressing PF7 will move the operator to the previous page of the screen, if any.

PF8 - If the operator has a screen displayed that has more than one page, pressing PF8 will move the operator to the next page of the screen, if any remain. The code "M" in the "MORE?" field, tells the operator that there is another page of the screen to be seen.

PF9 - Certain screens are programmed to "Toggle" directly to another screen within NCRR/ISIS by pressing the PF9 key. A "Toggle" could be called a "very fast path" to the designated screen. After the operator has either used the screen to update or view the information on the second screen, she/he can press PF9 again, and the system will return to the original screen.

PF11 - Pressing PF11 while on certain screens, will cause the system to print a report from the screen, and route it to the users printer ID. It may be necessary to enter the printer ID with some screens, prior to pressing PF11.

PF12 - It is always necessary to press PF12 to update any screen in NCRR/ISIS. Pressing the ENTER key will cause the system to execute the appropriate edits, but PF12 is required to actually update ISIS.
NON-CREDIT COURSE CREATION FORM

The course administrator should list all of the data elements on this form in preparation of the creation of a new course in ISIS using the EASY form NCRD. The elements that are followed by the symbol (R) are required on the NCRD form. Optional elements should be entered by the administrator, if known. When all data elements are written on all three pages of this form, and the NCRD form has been submitted and approved on an EASY form to the appropriate college, the form should then be given to the registrar or registrar designee of the offering unit.

BUDGET NUMB _ _ _ _ _ _ _ _ (R)  (Send to College X-Code:__________)

SEM EFF _ _ _ _ (R)  E V M TYPE __ (R)  GRADE TYPE __ (R)

UNIT MIN _ _ _ _ (R)  UNIT MAX _ _ _ _ (R)  TOTAL HOURS _ _ _ _ (R)

SHORT TITLE____________________________________________________(40 CHAR LIMIT)(R)

COURSE TITLE__________________________________________________________________________________________(150 CHAR LIMIT) (R)

COURSE DESCRIPTION__________________________________________________________________________________________(624 CHAR LIMIT) (R)

Press PF 8 to move to page two of the NCRD form

ADDITIONAL PARTICIPATING DEPARTMENTS
(enter department abbreviation and % ONLY if course is shared by more than one academic department)

DEPT ABBREV %

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

_ _ _ _ _ _ _ _ _ _ _ _ _ _

ADDITIONAL INFORMATION

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

______________________________________________________________________________________________

(474 CHAR LIMIT)
The following data elements will be entered into ISIS by the registrar of the offering unit to create a section of the course using ISIS screen ARUCNT. The elements that are followed by the symbol (R) are required on screen ARUCNT. Optional elements should be entered by the registrar, if known.

SEM OFFERED __ __ (R) COURSE NAME & SECT __ __ __ __ __ __ (R)

PROV/LOC/DEL __ / __ / __ (R) INSTRUCTION TYPE __ __ (R)

COURSE BEGIN DATE __ / __ / __ (R) COURSE END DATE __ / __ / __ (R)

OFFERED TO INDIVIDUALS (I) OR A GROUP? (G) __ (If "G" is selected, a Memo of Agreement or contract must have been signed with a company. If neither symbol is entered, the system defaults to "I". If both "I" AND "G" are selected, individuals outside of the terms of the memo or contract enroll)

SECTION COMMENT

If individual students will be registered for this offering, complete the enrollment projection fields below:

ENROLLMENT PROJECTION

MINIMUM ____ (Minimum number of enrollments to break even financially)

MAXIMUM ____ (R) (Class limit)

EXPECTED ____ (Expected number of enrollments - Used to project budget)

If individual students will not be registered for this offering, enter the estimated male and female enrollments in the spaces below. These figures should be adjusted after the event is offered.

ENROLLMENT ESTIMATION

EST ENROLL MALE ____

EST ENROLL FEMALE ____

Enter all FANS numbers associated with the offering of the course:

BUDGET NUMB __ __ __ __ __ __ (R) FUND NUMB __ __ (R) OBJ CODE __ __ (R)

SUB-OBJECT __ __ __ __ __ __ __ __ __ __ __ __ __ __ (30 CHAR)

COST CENTER __ __ __ __ __ __ __ (10 CHAR) ACTIVITY __ __ __ __ __ __ __ (10 CHAR)

Enter the time and place where course will meet:

MEETING DAY(S)________ (R) BEG TIME_______(R) END TIME_______(R)

ROOM____________________(R)
Enter instructor(s) name(s) and instructor's social security number (**one instructor name is required**):

INSTRUCTOR       SSN
_________________  __________________
_________________  __________________
_________________  __________________
_________________  __________________

Enter the "Forfeit" date (date before class begin date when tuition would be forfeited):

_ _ / _ _ / _ _

Enter AUDIENCE _____ (R); AUDIENCE DIVISION _____; and AUD SUB-DIV _____ codes    (sys
default to GENRL audience code if no audience code is entered)

Enter name of person administering the course ____________________________ (R)

Enter name of academic contact, if any ________________________________

List co-provider(s) of course if offering is shared among other course providers:

_ _ (code used is the campus code or code of offering unit, if other than a campus)

_ _

_ _

_ _

The registrar will enter the schedule number in the space below, and give this form to the financial officer.

**********************************************************************************************
**********************************************************************************************

The following data elements will be entered into ISIS by the financial officer of the offering unit using screen ABTN.

SCHEDULE NUMBER _ _ _ _ _ _ (R)      SEMESTER/YEAR _ _ _ _ (R)

Enter tuition amount $________ (R) (**required if no memo or contract has been signed**)

Enter CODE, AMOUNT, OBJ CODE, SUB-OBJ CODE, COST CENTER, and ACTIVITY for each additional charge or
discount that is associated with this offering (**CODE, AMOUNT and OBJECT CODE are required for each
additional charge or discount. Discount codes will have a minus number in the "AMOUNT"**):

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<th>CODE</th>
<th>AMOUNT</th>
<th>OBJ CODE</th>
<th>SUB-OBJ</th>
<th>COST CNTR</th>
<th>ACTIVITY</th>
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</table>

**Financial officer:** Enter a "Y" in the REG INDIC field and press PF12 when all of the financial data has been entered. This will allow registrations to be entered and charges to be made to the student and/or the company accounts. Return this form to the course administrator who initiated the course.