



Scholastic ONline Information System
for the Web

Semester and Year End Preparation Guide

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This is a checklist of typical tasks required to prepare for a new semester and to end an academic year. Most of these tasks are covered in existing SONISWEB® texts. This guide references those texts and describes what part is needed to prepare for a semester or to end a year.

Since every institution has its own list of additional required tasks, space is provided on page 18 for adding your tasks.

March 2006

The logo for RJM Systems, Inc. It features the letters 'RJM' in a stylized, blue, serif font, with the 'R' and 'J' overlapping. To the right of 'RJM' is the text 'Systems, Inc.' in a blue, italicized, serif font.

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NEW IN THIS EDITION

- This edition is for SONISWEB® version 2.0.
- Disabling Web Access Privileges, page 6.
- Deleting Web Access Privileges, page 6.
- Review and Revise Affiliation Fees, page 7.
- Review and Revise Course and Section Charges and Fees, page 8.
- Add New Application Entry Dates, page 9.
- Set up New Payment Plans, page 14.

PREPARING FOR THE NEXT SEMESTER OR THE NEXT SCHOOL YEAR

To use this guide, examine the list of typical tasks in the “Table of Contents” on page 2. Check the ones that you need for your institution, then refer to the pages that describe them. Cross out those you do not need.

Instructions are described in existing texts such as “Course & Section Processing”. Make a note of the texts you need, then either print them or access them on your computer.

It is unlikely that one person will do all of these tasks. If you are responsible for seeing that they are done, you can use this text as your checklist. You can send annotated copies of this text to those with the knowledge and profile security to do each task.

Remove or Change Web Access (Log-on) Privileges for Former Students, Rejected Applicants, and Departing Faculty

- Completed on ____ / ____ / ____ by _____

Text: “Students, Faculty, Applicant and Alumni/ae Record-keeping”

Security access required: the Biographic record under **Names** for Withdrawn Students (WD¹), Students (ST¹), Faculty (FA¹), Applicants (AP¹), Online Applicant (OA¹), and Alumni/ae (AL¹).

If no one person has access to student and faculty and applicant and alumni records, divide this task and assign the parts to staff with security access for each category of person.

To temporarily remove Web access privileges for a departing person, click the Disabled checkbox in the Biographic record shown in Figure 1. Another option is to erase his or her PIN² in his or her Biographic record; see Figure 1.

To change privileges from Applicant to Student, do “Transfer Accepted Applicants to Student Status” (page 12). That changes the logon selection³ the person can use.

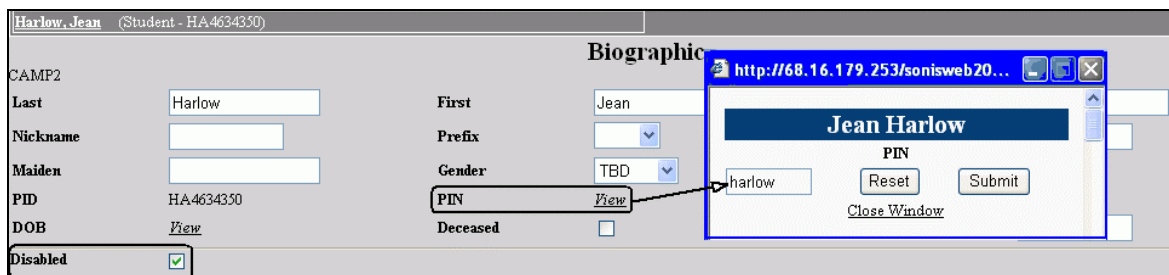
To change privileges from Student to Alumnus-Alumna, do “Graduate a Class” (page 11). That changes the logon selection⁴ the person can use.

¹ These are the SONISWEB® codes used for each status. A person can have more than one status such as Alumna (AL), Faculty (FA), and Student (ST).

² PIN = Personal Identification Number. It allows access as student, faculty member, alumnus-alumna, and applicant. It does not permit access as an administrator.

³ An applicant can remain an applicant while also a student. In that case, the person can log on as an applicant to view her or his applicant checklist and also log on as a student to see his or her student records.

⁴ As with an applicant, a person can graduate but still be a student. Therefore the person can log in either as an “Alum” or as a student and see the records applicable to that role.



• Figure 1 A Portion of a Biographic Record

To give the person a new PIN, change it in the Biographic record, Figure 1.

If the person also has administrator access with a User-ID and Password, go to “Remove Web access (Log-on) Privileges for Departing Administrators with User-IDs” below.

Remove Web access (Log-on) Privileges for Departing Administrators with User-IDs

Completed on ____ / ____ / ____ by _____

Text: “User Authorization & Profiles”

Security access required: User Security under Names or User IDs under Systems.

Administrators – unlike students, faculty, alumni/ae, and applicants – can view and change any records their profile authorizes them to change. Administrators use specially assigned User-IDs⁵ and Passwords. Everyone else uses her or his ID⁶ (PID) and an assigned PIN². To make changes for those with PINs, see “Remove or Change Web Access (Log-on) Privileges for Former Students, Rejected Applicants, and Departing Faculty” (page 4).

Some people will have both means of access. A faculty member who is also a Dean will likely have both faculty access with a PIN and administrator access with a User-ID and Password.

- You can disable a person’s User-ID, the best choice for a faculty or staff member who is on leave since you can enable the person later; see “Disabling Web Access Privileges” on page 6.
- You can delete a person’s User-ID, a permanent action; see “Deleting Web Access Privileges” on page 6.

⁵ User-ID is assigned at the time a person is given administrator access. It is often the person’s initials or some abbreviation of her or his name.

⁶ A person’s ID – also called a PID – is his or her student number, faculty ID, employee ID, etc. It must be 9 characters long and contain no punctuation.

Disabling Web Access Privileges

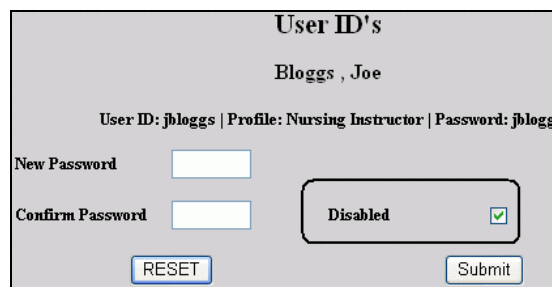
You can disable several people quickly using User IDs under Systems. You get a list of user-ids as shown in Figure 2.

User ID's			
Name	User ID	Profile	Disabled
<u>Bloggs, Joe</u>	jbloggs	Nursing Instructor	NO
<u>Sanderson, Glenda</u>	sys1	System Administrator	NO
<u>Schuler, Paul</u>	PSFunds	FundRaisersDevelopmt	NO
<u>Staffer, Tanya</u>	sandy	Master	NO
<u>Summers, Sally</u>	sally	Clerical Staff	NO

• Figure 2 User-IDs List

In Figure 2 click the underlined name of the person whose logon privileges you want to disable. That yields Figure 3.

Click the disabled checkbox then the Submit button shown in Figure 3.



• Figure 3 Disable User-ID

You return to the list in Figure 2 where you can select another User-ID and disable it.

Deleting Web Access Privileges



• Figure 4 Disable or Delete Administrator User-ID

As Figure 4 shows, you can Delete or Disable a User-ID. The Delete button permanently removes access. You get to Figure 4 by using **Names** to search for the person, then User Security to get this display.

Examine the Web Log to Purge Unneeded Records

- Completed on _____ / _____ / _____ by _____
Text: "Administration"

Security access required: Web Logs under Systems.

The Web Log is used for tracing and diagnosing problems. It can also be used for auditing. It gets very large during a semester. If you have no further use of the past log records, use the Purge Logs function to erase them.

Add New Courses and Change Existing Courses

Completed on _____ / _____ / _____ by _____

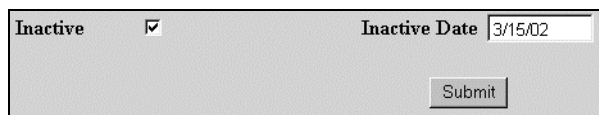
Text: “Course & Section Processing”

Security access required: Course Add/Edit under **Courses**.

As your course catalog changes, you will change the description and/or credits for a course. In fact, it may be truly a new course but with the same name. You may add a course of the same name (MATH200, for example) and SONISWEB® will not get confused. It will use the old course for students who have completed it because it uses internal numbers to keep track of “old” courses.

However, two courses of the same name are very confusing to your users, especially when setting up course sections as outlined in “Create or Copy New Course Sections for the Next Semester” (page 10). To reduce the confusion, take these steps before entering a “new” course with the same name:

1. After all of your students have registered for the semester, edit the old course and click the Inactive checkbox until a checkmark appears as illustrated in Figure 5.



The screenshot shows a form with a label 'Inactive' and a checked checkbox. To the right is a text input field labeled 'Inactive Date' containing the value '3/15/02'. Below these elements is a 'Submit' button.

• Figure 5 Inactive Checkbox in Course Record

2. Enter the Inactive Date, then click the Submit button. The course can no longer be selected for adding new sections.

Now you can follow the instructions in the “Course & Section Processing” text to enter the new course with the same name.

Review and Revise Affiliation Fees

Completed on _____ / _____ / _____ by _____

Texts: “Financial Record-keeping and Billing” to set up the affiliation codes, and “Students, Faculty, Applicant and Alumni/ae Record-keeping” to assign them to individual students. “Course and Section Processing” assigns affiliations to each course. “Financial Record-keeping & Billing” is needed to change affiliations within Flat Fees.

Security access required: Fee/Affiliation Utility under **Systems** to set the codes and flat fees, the Biographic record under **Names** to assign affiliation to students, and **Courses** to assign affiliation to courses.

Affiliations are commonly “in-state resident” and “non-resident”. They can also include special fees for students enrolled in other institutions. If your institution has added or ended an affiliation, you change the codes under **Systems**, those students to whom those affiliations are assigned under **Names**, the courses under **Courses**, and flat fees under **Systems**. If the fees for an affiliation have changed, go to “Review and Revise Course and Section Charges and Fees” below.

Review and Revise Course and Section Charges and Fees

- Completed on _____ / _____ / _____ by _____
- To change the fees of many courses for a wide-spread fee change, use Fee/Affiliation Utility under **Systems**.
 - To change just a few courses, use Course Add/Edit under **Courses**.

Text: “Financial Record-keeping and Billing”

Security access required Fee/Affiliation Utility under **Systems**.

Before changing any fees and charges:

1. Make Affiliation changes first (see page 7).
2. Make sure all of your students have registered for the courses or sections you are changing and that they have been billed. That will ensure that they get the current fees, not the new ones.

Text: “Course & Section Processing”

Security access required Course Add/Edit under **Courses**.

Before changing any fees and charges:

1. Make Affiliation changes first (see page 7).
2. Make sure all of your students have registered for the courses or sections you are changing and that they have been billed. That will ensure that they get the current fees, not the new ones.

See the text to edit or add charges and fees.

Revise the Flat Fees

- Completed on _____ / _____ / _____ by _____

Text: “Financial Record-keeping and Billing”

Security access required: Flatfees under **Systems**.

Before changing the flat fees:

1. Make sure all of your students have registered for the courses or sections you are changing and that they have been billed. That will ensure that they get the current fees, not the new ones.
2. Make Affiliation changes first (see page 7).
3. Change the flat-fee-to-affiliation assignment.

See the text to edit or add flat fees.

Review and Revise Semester “Additional” Fees Not Connected to Courses and Sections

- Completed on _____ / _____ / _____ by _____

Text: “Financial Record-keeping and Billing”

Security access required: Additional Fees under **Systems**.

Before changing any fees, make sure all of your students have registered for their courses or sections and that they have been billed. That will ensure that they get the current fees, not the new ones.

See the text to edit or add charges and fees.

Add New Application Entry Dates

- Completed on _____ / _____ / _____ by _____

Text: “Table Configuration & Maintenance”

Security access required: Application Entry Date under **Systems**.

The dates are used for Applicant records. You should disable old dates you don’t want selected and add new ones for upcoming applications.

Application Entry Date		
Record 11 - 20 of 21		
Entry Date	Disabled	
09/01/2003	Y	
01/13/2004	Y	
01/21/2004	Y	
03/03/2004	Y	
06/02/2004	Y	
09/01/2004	Y	
01/12/2005	Y	
08/01/2005	N	
11/11/2005	N	
08/01/2006	N	

• Figure 6 Application Entry Dates

Review and Revise Disposition Fees

- Completed on _____ / _____ / _____ by _____

Text: “Applicant Checklists, Activities, and Dispositions”

Security access required: Disposition Activities under **Systems**.

If you charge fees for disposition – acceptance, waitlist, rejection – and they change next semester or next year, revise them. Before changing any fees, make sure all the applicants to be charged the current fee have had it applied and that they have been billed. That will ensure that they get the current fees, not the new ones.

Review and Revise Application Fees

- Completed on _____ / _____ / _____ by _____

Text: “Applicant Checklists, Activities, and Dispositions”

Security access required: Additional Fees under **Systems**.

If you charge fees for applications and they change next semester or next year, revise them. Before changing any fees, make sure all the applicants to be charged the current fee have had

it applied and that they have been billed. That will ensure that they get the current fees, not the new ones.

Review and Revise Program Fees

- Completed on _____ / _____ / _____ by _____

Text: “Financial Record-keeping and Billing”

Security access required: Program Type under **Systems**.

These are fees for costs specific to a program not to a course or section. Before changing any fees, make sure all of your students have registered for their courses or sections and that they have been billed. That will ensure that they get the current fees, not the new ones.

See the text to edit or add charges and fees.

Set up Semester Parameters for Financial Aid

- Completed on _____ / _____ / _____ by _____

Text: “Financial Aid”

Security access required: Table Maintenance under **Systems**.

Set the financial aid tables for the next semester. They must be set correctly to import financial aid data from the suppliers. The most common changes are:

- Downloading the latest copy of EDEXpress or PowerFAIDS® and their manuals.
- Revising the Awards table for new codes and/or loans and scholarships allocations.
- Revising the Pell Grants table for the requirements of the next year.
- Revising the SAP (satisfactory academic progress) table.
- Revising the Annual Allocation and Loan Fees in the Awards Table.
- If you use PowerFAIDS, setting the PowerFAIDS® table with the parameters supplied by your financial aid supplier.

Create or Copy New Course Sections for the Next Semester

- Completed on _____ / _____ / _____ by _____

Text: “Course & Section Processing”

Security access required: Section Add/Edit under **Courses**.

When you add or copy a section, SONISWEB® assumes that the school year and semester set in the System Variable is the one you want to use. You see that year and semester at the top of the “Section Add” display as illustrated in Figure 7.



The screenshot shows two dropdown menus. The first is labeled 'School Year' and has '200506' selected. The second is labeled 'Semester' and has 'Spring' selected.

• Figure 7 Year and Semester from Course Section Add

If you are adding or copying sections for a year and/or semester different from that shown in Figure 7, you have two choices. You can use the pulldown arrows in Figure 7 to select a different year and/or semester. You can change the “automatic” semester and year as described in “Change the Current Semester and School Year in System Variables” (page 12) before adding sections.

You should check the assigned rooms, times, days, and instructors for the sections you copy. You’ll often need to change these for the new semester.

With the school year and semester dates set, follow the instructions in the text.

Graduate a Class

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: For setup, student Education records in **Names**. For graduating students, Graduation Processing under **Systems**.

Graduating students must have their “home institution” education records set with the proper program code and graduation year.

It uses the active program and the graduation year plus graduation month or the original graduation date in establishing graduation eligibility. It’s covered in the “Graduation and Promotion” manual.

Information on the education record and the graduation process is described in the text.

Reinstate Withdrawn Students

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: Withdrawn Students under **Systems**.

Students archived as withdrawn (see page 15) can be reinstated with the process outlined in the text. If any are candidates for promotion, this step should precede “Promote Qualified Students” below.

Promote Qualified Students

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: Set up, Year End Promotion Settings under **Systems**. For promotion use Year End Promotion under **Systems**.

Make sure grades are final and official⁷ before attempting to promote. Promotion is based on Program and the number of credit hours completed with official grades. Instructions for both setup and promotion are covered in the text.

Transfer Accepted Applicants to Student Status

- Completed on ____ / ____ / ____ by _____

Text: Primary “Students, Faculty, Applicant and Alumni/ae Record-keeping”. Secondary, “Applicant Checklists, Activities, and Dispositions”

Security access required: Applicant Application under **Names**.

Acknow. Date	04/21/2005	Create Student Status	<input checked="" type="checkbox"/>
Application Completed	<input checked="" type="checkbox"/>		

• Figure 8 Portion of an Application Record

The process is explained in the disposition section of the “Applicant Checklists, Activities, and Dispositions” text. The important point is that the applicant’s Application record must have the Student checkbox marked as illustrated in Figure 8.

Once the application is correct, the status⁸ of “Student” is added as described in the applicant to student process in the “Students, Faculty, Applicant and Alumni/ae Record-keeping” text.

Enter Transfer Courses and Institutions

- Completed on ____ / ____ / ____ by _____

Text: “Course & Section Processing”

Security access required: Add Transfer button under **Courses**.

Before the start of student registration, you enter all the transfer courses for each student using “Transfer Registration”.

A transfer course must be matched with your standard courses before registration begins, so preparation for a new semester is a good time to “add” those new transfer courses. The manual guides you through setting them up including adding new institutions if needed.

Check Outstanding Holds

- Completed on ____ / ____ / ____ by _____

Text: “Reports”

Security access required: Holds report under **Reports**.

⁷ Making grades official is a separate step that follows entering the grades for a semester.

⁸ A “status” defines the role or roles a person has in your institution. Examples are ST for student, FA for Faculty, AP for applicant, AL for “alumni”, etc. A person could have any or all available statuses (roles) at the same time.

As the semester ends, you can check on outstanding holds to make certain they're still relevant. The quickest way to do that is to run the Holds report. You can use it to change individual Holds records as needed.

Establish Group Holds

- Completed on _____ / _____ / _____ by _____

Text: "Registration by Staff"

Security access required: Systems Registration Hold.

You can establish group holds. For example, all entering students (level-class-year = 0) can be placed on hold until they've seen their advisors. All students below the senior level (level-class-year less than 4) can be placed on hold until the impending graduates register for their classes.

Add the Upcoming Year to the Years Table

- Completed on _____ / _____ / _____ by _____

Text: "Table Configuration & Maintenance"

Security access required: Systems Table Maintenance.

Add school years to the Years table so you can process inquiries and applications from prospective students and applicants.

Change the Current Semester and School Year in System Variables

- Completed on _____ / _____ / _____ by _____

Text: "System Variables Configuration & Maintenance"

Current Semester	Fall	Current School Year	200708
------------------	------	---------------------	--------

• Figure 9 Year and Semester in System Variables

Security access required: System Variables under Systems.

If you set the new semester before adding new course sections ("Create or Copy New Course Sections for the Next Semester", page 10), you minimize the chances that a new section is assigned to the wrong semester.

Set up New Payment Plans

- Completed on _____ / _____ / _____ by _____

Text: “Financial Record-keeping and Billing”

Security access required: Payment Plans under Systems.

Check the current payment plans and disable any you don’t want to offer in the future. You can also add new payment plans.

Change Billing Dates and Notes in System Variables

- Completed on _____ / _____ / _____ by _____

Text: “System Variables Configuration & Maintenance”

Security access required: System Variables under Systems.

Default Billing Date	10/06/2004
Billing Memo	Bills due in 30 days unless you have an approved payment schedule.

• Figure 10 Billing Part of the System Variables Display

Having the correct billing date is important when producing bills. That date is printed on the bills and is used to calculate which are the current charges and which are part of the “Prior Balance”. The Billing Memo is also printed on the bills.

Review and Change Applicant Checklists and Activities

- Completed on _____ / _____ / _____ by _____

Text: “Applicant Checklists, Activities, and Dispositions”

Security access required: Application Activities, Applicant Checklists, and Table Maintenance under Systems.

Checklists are the actions and forms you need from your applicants in order to evaluate their admission. Activities are the tasks your staff must do as part of admissions preparation.

As you add new programs, you need to create checklists and activities for them. When (or if) your expectations for admissions change, you need to add and delete both checklists and activities.

Archive Graduate Records

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: Graduated Student Archiving under Systems.

Once you “Graduate a Class” (page 11), you archive the records of these graduated students.

Archive Withdrawn Students

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: Withdrawn Students under **Systems**.

Students have a status of ST. Using the Withdrawn Students function, you can change their status from ST to WD (Withdrawn). They can be reinstated later as needed as described on page 11.

Changing Students to Alumni/ae and Constituents

- Completed on _____ / _____ / _____ by _____

Text: “Graduation and Promotion”

Security access required: Graduated Student Archiving under **Systems**.

As part of “Archive Graduate Records” above, you choose what statuses¹ the graduates are to keep.

Set up Housing (Dorm and Apartment) Rooms and Charges

- Completed on _____ / _____ / _____ by _____

Text: Primary, “Housing”; if new buildings must be defined “Room, Building & Campus Records”.

Security access required: Housing and Search Housing under **Systems**. If new buildings or campuses have been added, you will also need “Room, Building, Campus” and Table Maintenance under **Systems**.

Before changing housing – especially housing charges – you should complete your assignment of housing for this semester. That ensures that your current housing assignments use the current charges, not the new ones.

You set the housing charges. You make any changes required of the housing attributes. You add any new housing to the list of available rooms and apartments.

Change Parking Lots (Zones) as Needed

- Completed on _____ / _____ / _____ by _____

Text: “Parking”

Security access required: Table Maintenance under **Systems**.

Parking is defined in “zones” in the “Parking Zones” table. The text guides you through setting them up and changing them.

Add or Update Parking Records

Text: "Parking"

Security access required: Parking under Names.

For those with permits, change the Zone, License Number, etc. for the new semester.

Review Students on Leave of Absence

- Completed on _____ / _____ / _____ by _____

Text: "Students, Faculty, Applicant and Alumni/ae Record-keeping"

Security access required: the Leave Status record for Students under Names

You may prefer to review students on leave during the admissions review process or after the semester ends. The records are a standard part of the students' records.

Revise Tests Defined in the Test Table

- Completed on _____ / _____ / _____ by _____

Text: "Table Configuration and Maintenance"

Security access required: Table Maintenance under Systems.

The test table contains the your tests that you choose to keep as part of student records⁹. If they have not changed, you do not need to access this table.

Revise Health Requirements in the Health Table

- Completed on _____ / _____ / _____ by _____

Text: "Table Configuration and Maintenance"

Security access required: Table Maintenance under Systems.

The health table contains the pre-admission inoculations and health tests you require of your applicants. It also contains current inoculations and their expiration dates for current students, faculty, and staff especially for those in your nursing or medical curricula. If they have not changed, you do not need to access this table.

⁹ Typically these are non-course tests such as pre-admission, licensure, etc., but you can establish and keep records for any tests you wish.

Review and Revise Financial Transaction Codes as Needed

- Completed on _____ / _____ / _____ by _____

Text: “Table Configuration and Maintenance”

Security access required: Table Maintenance under **Systems**.

If you’ve added new financial transactions or wish to disable existing transactions so they can’t be used, get a copy of the text and make the changes. It’s called the Transaction Codes table.

If your financial accounting system has changed or you add new transaction codes, you need to update your Transaction Code Mapping table. This table is not needed if you use The Financial Edge® as your financial system.

Set the Registration Dates and Rules for Next Semester

- Completed on _____ / _____ / _____ by _____

Text: “Registration by Staff”

Security access required: Web Options under **Systems**.

The text guides you in planning registration – including online registration by students and faculty – for the next semester.

Remove Unneeded Prospective Student Records

- Completed on _____ / _____ / _____ by _____

Text: “Recruiting Prospective Students”

Security access required: Prospects: Delete under **Systems**.

Examine your records retention preferences for prospective student records and remove old records as outlined in the text.

YOUR ADDITIONS TO THE LIST