Running Batch Term Activation

Purpose: Use this document as a reference for running batch term activation in ctcLink.

Audience: Student Records staff

⚠ You must have at least one of these local college managed security roles:

- ZZ SR Batch Term Activation

  If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Students must be term-activated before enrolling for that term. This guide will walk you through running batch term activation.

The term activation batch job runs more efficiently with fewer active program/plan stacks, and fewer term-activated students affect tuition calculation more efficiently. This also prevents accidental term activations. You should develop criteria for when a student must reapply to your institution and submit a ticket to **batch discontinue ineligible students**.

Running Batch Term Activation

Navigation: Records and Enrollment > Term Processing > Term Activation > Term Activation Batch Process

1. The search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
3. It is important to note that **Run Control IDs** cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_Batch_Term_Activation.

Selection 1 Tab

1. Use the **Selection 1** page to enter the request parameters. These parameters will define the processing rules and data to be included when the process runs.
2. On the **Selection 1** tab, enter (at a minimum) the required fields.
3. **Institution:** (e.g., WA171 for Spokane Community College).
4. **Academic Career:** (e.g., UGRD for Undergraduate).
5. **Actvtn Term:** This is the term to be activated (e.g., 2147 for Fall 2014).
6. **Commit Freq:** Use the Commit Freq (commit frequency) field to select how many table rows of information (students) you want to process before committing changes to the database. The default is 1000. Consult your institution's database administrator for the appropriate setting for your institution. If you set the commit value to higher than the number of rows the program processes, then the program will only commit data once at the end of the run.
7. **Run Mode:** If you select **Insert**, the process will only consider students not yet activated for the activation term. If eligible, the process adds a new row of term data to the student's career term record. If you select **Update**, the process will only consider students already activated for the activation term. If eligible, the process updates the student's existing career term data.
8. **Selection criteria:** Use the Selection Criteria field to indicate the criteria you want the Term Activation process to use. Select "Panel Criteria" to use the fields available in the component to specify the criteria that determine eligible students. Select "Custom Population" to activate a custom population of students for one term or across multiple terms. For example, use this option when you need criteria beyond what the component provides or when you want to perform a student records conversion.
9. **Optional fields:** The remaining fields on the Selection 1 tab are optional and can be used to narrow the population being activated.
10. **Global Exclusion Rule:** Enter a Global Exclusion Rule to exclude students from term activation. Students may be excluded based on academic standing, program action, or service indicator values. Visit the QRG **Term Activation Batch Setup** for more information about Global Exclusion Rules.

Selection 2 Tab

1. Select the **Selection 2** tab. Use the Selection 2 page to narrow the population being activated.
2. Enter any program actions, academic standings, and service indicators that the Term Activation process should consider eligible for term activation.
    a. If applicable, enter a **Program Action** (e.g., ACTV); for other program actions such as **DATA, PLNC,** or **PRGC**, the **Run Mode** must be changed to **Update**. Choose the desired Program Action from the **Selection 2 tab**. Before running the process, you will return to the Selection 1 tab and change the **Run Mode** to **Insert**.

Selection 3 Tab

> ⓘ Term activation fails due to an **Oracle bug** if a student has over 100 enrollment transactions over the terms entered on the Selection 3 tab (Term Activation Batch Process page). Use the query **QCS_SR_ENRL_TRANS_COUNT** to identify students whose terms should be manually activated.

1. Select the **Selection 3** tab. Use this page to enter required enrollment terms or lapse rules for a single run of the Term Activation process. To be eligible for term activation in the term specified on the Selection 1 page, a student must be enrolled in the term specified on this page according to the rules you define. Using the Selection 3 page, you can prevent students without enrollment records from activating for the current term.
2. Select the **Process Control** tab. Use the Process Control page to indicate how the Term Activation process initializes or sets various values in your PeopleSoft Student Administration system.
   a. **Tuition Calc Required:**
      - **Business Unit**: When the field is in Insert mode on the Selection 1 tab, it updates to Business Unit; however, it cannot be changed or edited.
      - **Yes**: The field is available in Update mode on the Selection 1 tab. When the **Yes** option is selected, the system signals to calculate tuition when it runs for your institution.
      - **No:** When selecting the No option, the system bypasses calculating tuition.
      - **No Change:** This is the default value if you run the process in Update mode on the Selection 1 tab.

   b. **Forms of Study:**
      - **Update (Selection 1 tab)**: When you run the process in **Update** mode, the system does not change the **Form of Study** if you choose No Change or Default Behavior. If other options are selected (Advanced to Candidacy, Detached Study, etc.), the term activation process will update the Form of Study on the Term Activation page.
      - **Insert (Selection 1 tab)**: When you run the process in **Insert** mode, the system inherits the value from the last term if you choose No Change or Default Behavior. If a student has never been term activated, the system inserts Enrollment by default.

   c. **FA Stats Calc Required:**
      - **Yes**: The system is alerted that a new FA Term build is required.
      - **No**: The system assumes no changes and skips the student.
      - **Default**: Sets the value to Yes
      - **No Change**: The system does not change the value.

   d. **Academic Load:**
      - **Update (Selection 1 tab)**: This field is required if the Forms of Study display a value other than Enrollment, No Change, or Default when running the process in Update mode.

e. **Eligible to Enroll:**
   - **Yes:** Enrollment is possible for students.
   - **No:** The process makes students ineligible to enroll.
   - **Default:** In Insert mode, if the student does not have a term activation row for a prior term within the same academic career, the process sets the flag on the student's career term record for the current term to Yes. If the student does have a term activation row, the process inherits the value from the previous term.
   - **No Change:** In Update mode, the system does not change the **Eligible to Enroll** System does not change value.

f. **Refresh Term Cntrl Dates (Update (Selection 1 tab)**:
   - Term control dates established on the **Academic Calendar** (Term Calendar 3 tab) are carried down to a student's term record when **the term is activated**. Suppose you change one of the following dates on the Academic Calendar:
   - Fully Enrolled Date
   - Show Enrollment on Transcript Date
   - Show Statistics on Transcript Date
   - Fully Graded Date
   - A student's term record is "locked" to the original date(s) before the change. You must refresh the term control dates to update the student's term record with the new date(s). Avoid recurring processes when selected since it will trigger an AAR update at each institution (for all active students) when it is run.

3. Use the checkboxes in the **Process Log Control** group box to select how you want the Term Activation process to log statistics—choosing the type and level of detail you need.
4. The system assigns a unique process number to the log file you generate to retain and track online versions of the log files. The log includes processing totals on students who are activated, updated, and ineligible. The selected system defaults are "**Activated Students**," "**Excluded Students**," and "**Run Criteria**."
   a. If you only want a count of the students included or excluded from term activation, clear all checkboxes.

5. Select the **Custom Population** tab. Use the Custom Population page to create a custom list of students to activate into terms or to retrieve, view, and edit an existing custom list of students. The fields on this page are available only when you select "Custom Selection" in the **Student Type** field on the **Selection 1 page**.

Running the Process

1. After all tabs have been completed, select the **Run** button. Please visit the QRG **Set Up Recurrences for Jobs** for more information on recurrences.
2. Make sure the **Term Activation** process is selected and select the **OK** button.
3. Select the **Process Monitor** link. The process may take time based on the number of records being processed.
4. Select the **Refresh** button to update the **Run Status** until it shows "Success" and the **Distribution Status** shows "Posted."
5. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to **Running Batch Term Activation**. This link will open in a new tab/window.