Applies to:
Student Lifecycle Management EHP3

Summary
This document describes the features and functions delivered with Student Lifecycle Management EHP3.

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Icons in Body Text

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
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<tbody>
<tr>
<td>🚨</td>
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Typographic Conventions

<table>
<thead>
<tr>
<th>Type Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Example text</em></td>
<td>Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation.</td>
</tr>
<tr>
<td><em>Example text</em></td>
<td>Emphasized words or phrases in body text, graphic titles, and table titles.</td>
</tr>
<tr>
<td><strong>EXAMPLE TEXT</strong></td>
<td>Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.</td>
</tr>
<tr>
<td><em>Example text</em></td>
<td>Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.</td>
</tr>
<tr>
<td><em>Example text</em></td>
<td>Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.</td>
</tr>
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<td><code>&lt;Example text&gt;</code></td>
<td>Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.</td>
</tr>
<tr>
<td><strong>EXAMPLE TEXT</strong></td>
<td>Keys on the keyboard, for example, F2 or ENTER.</td>
</tr>
</tbody>
</table>
Table of Contents

1. Student Lifecycle Management (IS-HER-CM) ................................................................. 8
  1.1 Technical Tools in Student Lifecycle Management .................................................. 9
  1.1.1 Objects in Student Lifecycle Management ......................................................... 9
    1.1.1.1 Academic Calendar .................................................................................. 9
    1.1.1.2 Exchange Program .............................................................................. 11
    1.1.1.3 External Subject .................................................................................. 12
    1.1.1.4 External Organization ....................................................................... 13
    1.1.1.5 External Qualification ....................................................................... 14
    1.1.1.6 Internal Qualification ....................................................................... 15
    1.1.1.7 Individual Work ................................................................................. 16
    1.1.1.8 Module Group ................................................................................... 17
    1.1.1.9 Organizational Unit ........................................................................... 17
    1.1.1.10 Assessment ..................................................................................... 18
    1.1.1.11 Student ......................................................................................... 19
    1.1.1.12 Program of Study ......................................................................... 19
    1.1.1.13 Module ......................................................................................... 20
    1.1.1.14 Academic Unit w/o Dates ..................................................................... 21
    1.1.1.15 Business Event ................................................................................ 22
    1.1.1.16 Business Event Package ................................................................... 23
    1.1.1.17 Business Event Type ....................................................................... 25
    1.1.2 Object Manager ....................................................................................... 26
      1.1.2.1 Finding/Selecting Objects .................................................................. 27
      1.1.2.2 Using Search Tools .......................................................................... 28
      1.1.2.3 Using Search Variants .................................................................... 29
    1.1.3 Object Selection Using a Selection Method ................................................... 29
    1.1.3.1 Object Selection for Program Type Progression .................................... 30
    1.1.3.2 Object Selection for Mass De-registration ........................................... 31
    1.1.4 Archiving in Student Lifecycle Management .................................................. 32
    1.1.5 Business Processes in Student Lifecycle Management .................................... 32
    1.1.6 The Student as a Business Partner ............................................................... 33
    1.1.6.1 Student Identifiers ............................................................................ 33
      1.1.6.1.1 Student Object ID ...................................................................... 33
      1.1.6.1.2 Student Number ........................................................................ 34
      1.1.6.1.3 The Student’s Business Partner Number ....................................... 35
    1.1.6.2 Editing Student Account Information ................................................... 37
    1.1.6.3 Study Data in the Student File .............................................................. 38
    1.1.6.4 Admission Application and Admission .................................................. 40
    1.1.6.5 Registration ..................................................................................... 41
    1.1.6.6 Change of Program .......................................................................... 42
    1.1.6.7 De-registration .................................................................................. 43
1.2.3.3.3 Maintaining a Module in the Module Catalog ................................................................. 78
1.2.3.4 Maintaining Business Event Types ...................................................................................... 80
1.2.3.5.5 Event Offerings of a Module in the Module Catalog .......................................................... 82
1.2.3.6 Copying Event Offerings ......................................................................................................... 84
1.2.3.6.1 Copying Event Offerings ........................................................................................................ 84
1.2.3.6.7 Creating Templates for Event Offerings ............................................................................ 86
1.2.3.8 Creating/Maintaining Programs ............................................................................................... 86
1.2.3.9 Creating/Maintaining Modules ................................................................................................. 87
1.2.3.10 Creating/Maintaining Module Groups .................................................................................... 88
1.2.3.4 Module Booking ....................................................................................................................... 89
1.2.3.4.1 Capacity Check During Module Booking ............................................................................ 90
1.2.3.4.2 Conditional Booking for Open Prerequisites ..................................................................... 91
1.2.3.4.3 Waiting Lists .......................................................................................................................... 93
1.2.3.5 Event Planning ......................................................................................................................... 94
1.2.3.6.1 Editing Event Offerings ......................................................................................................... 94
1.2.3.7 Copying Event Offerings ......................................................................................................... 96
1.2.3.8.1 Copying Event Offerings ........................................................................................................ 96
1.2.3.8.3 Creating Templates for Event Offerings ................................................................................ 98
1.2.3.5.4.1 Creating Templates for Event Offerings ........................................................................... 98
1.2.3.4.5 Event Offerings for Cohorts ................................................................................................. 98
1.2.3.5.5 Editing Academic Events .................................................................................................... 99
1.2.3.6.5.1 Editing Business Events with a Regular Schedule ............................................................. 101
1.2.3.5.5.2 Editing Business Events with an Irregular Schedule .......................................................... 102
1.2.3.5.5.3 Editing Business Events Without a Schedule .................................................................... 102
1.2.3.5.5.4 Editing Time-Independent Events ..................................................................................... 103
1.2.3.5.6 Copying Event Offerings ...................................................................................................... 103
1.2.3.5.7 Teaching Workload Evaluation ........................................................................................... 103
1.2.3.5.8 Resource Planning ............................................................................................................... 104
1.2.3.5.9 Overview of (Internal) Academic Work .............................................................................. 105
1.2.3.6.1.1 Creating/Maintaining Internal Qualifications ...................................................................... 106
1.2.3.6.2 External Academic Structures ............................................................................................. 107
1.2.3.6.3 Creating Academic Scales ................................................................................................. 107
1.2.3.6.4 Rules .................................................................................................................................. 111
1.2.3.6.4.1 Maintaining Validations ..................................................................................................... 112
1.2.3.6.4.2 Maintaining Substitutions .................................................................................................. 113
1.2.3.6.4.3 Setting Up Rule Modules ................................................................................................... 114
1.2.3.6.4.4 Rule Container .................................................................................................................. 116
1.2.3.6.4.5 Maintaining Rule Containers ............................................................................................ 118
1.2.3.6.4.6 Rules Overview ................................................................................................................... 118
1.2.3.6.4.6.1 Structure View of Rules Overview ................................................................................ 119
1.2.3.6.4.6.2 Calling the Structure View of the Rules Overview ......................................................... 119
1.2.3.6.4.6.3 Process View of Rules Overview .................................................................................... 120
1.2.3.6.4.6.4 Calling the Process View of the Rules Overview ............................................................ 122
1.2.3.6.4.7 Overriding Message Logs ................................................................................................. 122
1. Student Lifecycle Management (IS-HER-CM)

Purpose

With increasing competition and shrinking budgets, universities see themselves forced to manage their internal processes more efficiently with fewer resources yet still provide high-quality teaching and study. The Student Lifecycle Management component of the SAP Higher Education & Research solution enables cost-effective management of higher education by providing functions that cover the following core processes of universities:

- Planning of academic offerings [Page 133]
- Organization and administration of students and their study data in the Student File [Page 38]
- Administration of fees and grants in the student account [Page 134]

In the Student Administration section of Student Lifecycle Management, you can process student admission, registration, re-registration, and de-registration. In the Academic Structure (Curriculum) and Teaching and Examination sections, you plan and manage the academic offerings and business events. Student Lifecycle Management enables you to take full account of your university’s resources. You can also enter the academic work that students have completed, and determine their academic progress.

The following diagram shows the functions that Student Lifecycle Management offers.
1.1 Technical Tools in Student Lifecycle Management

There are some tools that can be used to facilitate processes in Student Lifecycle Management.

1.1.1 Objects in Student Lifecycle Management

The object-oriented design of Student Lifecycle Management and the numerous objects it contains enable you to manage your university’s academic processes efficiently.

1.1.1.1 Academic Calendar

Definition

Time table that contains the dates and periods of university events.

Use

In the academic calendar (object type CA), you can define specific dates and periods. Dates and periods are defined as time limits in the system. A time limit is a date or period classification. You can specify the start and end dates and start and end times of a given period or date by defining a time limit and entering the relevant academic year and session.

The Student Lifecycle Management system contains the following standard time limits:

- **Standard duration of the academic session (0100)**
  You use this standard time limit to define the start and end dates of academic sessions in the academic calendar.

- **Class period (0200)**
  You use this standard time limit to define the periods during which your university offers teaching events. The class period of an academic session can differ from the standard duration of this academic session. For example, the class period can begin after and end before the academic session itself. If you do not define any class periods, the system assumes that teaching events can be scheduled throughout the entire academic session.

- **Module booking with priorities (0300)**
  You use this standard time limit to define when students are allowed to book modules. In this way, the system ensures that the modules offered in a specific academic session (defined by the standard duration of the academic session) are booked within the time period specified in the module booking with priorities time limit. You can also combine the dates and periods of this time limit with time windows for different student groups.

An academic calendar is assigned to an organizational unit. The programs and modules assigned to the organizational unit use the academic calendar of this organizational unit. The time limits specified in the academic calendar are inherited by the lower-level objects of the structure. You can override the time limits defined for the higher-level object by creating a new academic calendar for a lower-level object. The new time limits are a specialization of those defined in the higher-level academic calendar. These specializations are inherited by the lower-level objects in the hierarchy.

You have created an academic calendar for an organizational unit. The SAP System uses this calendar for the programs and modules assigned to the organizational unit. If you create a different academic calendar for a specific program, the time limits of this academic calendar override the time limits in the academic calendar defined for the organizational unit. In this way, you can define different academic sessions for lower-level organizational units (e.g. faculties).

The time limits of the calendar objects linked to a module are not inherited by the lower-level objects.
The SAP System uses academic calendars to check if students have submitted their applications before the deadlines specified there. When an application is submitted outside of the specified period, the SAP System outputs a message. Before doing so, the SAP System reads the rules [Page 111]. The academic periods of the university and its lower-level organizational units are also defined in the academic calendar.

**Example 1:** You set up the academic session *winter semester 2001* in the top organizational unit. The system derives the start and end dates of the winter semester in the 2001 academic year from this organizational unit.

**Example 2:** Your university has a set registration period for each academic session. To map this in the system, you create an academic calendar and enter the registration periods there. If an application for registration is received within this period, the application is assumed to have been submitted on time and is then forwarded to the administrator in charge for processing. However, if an application is received outside of the given registration period, the SAP System informs the administrator of this in a message.

**Structure**

You can create and maintain an academic calendar (object type CA) for the following objects:

- **Organizational unit [Page 17] (object type O)**
- **Program [Page 19] (object type SC)**
- **Module [Page 87] (object type SM)**
- **Event package [Page 23] (object type SE)**
You can create and maintain the following infotypes for an academic calendar:

<table>
<thead>
<tr>
<th>Infotype</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object (1000)</td>
<td>Object abbreviation and name of the academic calendar</td>
</tr>
<tr>
<td>Relationships (1001)</td>
<td>Relationship to one of the above objects by means of relationship type B 510</td>
</tr>
<tr>
<td>Description (1002)</td>
<td>General description</td>
</tr>
<tr>
<td>Site-Dependant Info (1027)</td>
<td>Relationship to a factory calendar</td>
</tr>
<tr>
<td>Time Limits/Sequences (1750)</td>
<td>Dates and periods in the academic calendar</td>
</tr>
</tbody>
</table>

**Editing the Academic Calendar**

To edit an academic calendar, choose **Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Academic Calendar** from the SAP menu.

**Prerequisites**

Before you can create an academic calendar, you must make the following settings in Customizing for **Student Lifecycle Management**:

- Perform all IMG activities in the section **Student Lifecycle Management Master Data → Academic Calendar → Academic Years and Sessions**
- Define the top organizational unit [Page 73] in the section **Student Lifecycle Management Master Data → Academic Structure → Organizational Structure → Define Top Organizational Unit**
- Define the time limits and time limit sequences that apply for each academic calendar in **Student Lifecycle Management Master Data → Academic Calendars**

You have also created a program catalog [Page 74] and mapped the organizational units and programs in this program catalog.

**1.1.1.2 Exchange Program**

**Use**

When you create a visiting studies [Page 54] record for a student in the student file, you can assign an exchange program to this visiting studies record. In this case, visiting studies then represent exchange studies.

To create or edit exchange programs, go to the SAP Easy Access screen and choose **SAP Menu → Student Lifecycle Management → Academic Structure → Exchange Program**.

**Structure**

The exchange program is an object of object type SX. The exchange program object consists of the infotypes listed below.

**Exchange Program Infotypes**

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>1000</td>
<td>Object abbreviation, description and language key of the exchange program</td>
</tr>
<tr>
<td>Relationships</td>
<td>1001</td>
<td>Relationship to other objects</td>
</tr>
</tbody>
</table>
### Integration

You can map admission prerequisites in the system by assigning an audit type and a requirement catalog to the exchange program.

You can also define the organizations and programs involved in an *exchange program*. The system supports the object types O (*organizational unit [Page 17]*) and EO (*external organization [Page 107]*) as organizations. You can also specify special periods and deadlines in the associated *academic calendar [Page 9]*.

#### 1.1.1.3 External Subject

**Definition**

Subject taught at an *external organization [Page 107]*.

**Use**

You can enter the academic achievements that students have accomplished in external subjects in the master data infotype *External Transcripts* (1719). External subjects can be recognized as equivalents to modules or internal qualifications.

**Structure**

External subjects (object type SU) are offered by external organizations (object type EO). A relationship therefore exists between the external subject and the external organization.

You can access the functions for maintenance of external subjects from the SAP menu by choosing *Student Lifecycle Management → Curriculum → Educational Background → External Subject*. You use the *object manager [Page 26]* when you create and maintain external subjects. The object manager is a convenient user tool that helps you find and select external subjects.

You can maintain the following infotypes for external subjects:

- *Object* (1000)
- *Relationships* (1001)
- *Description* (1002)
- *Disciplines* (1744)
- *External Subject Data* (1760)
In the *Relationships* infotype, you can enter a special grading scale for external subjects using the *Additional data* function. The special grading scale overrides the general grading scale defined for the external organization [Page 107] in the infotype *Scales/Credits* (1755).

### 1.1.1.4 External Organization

**Definition**

External organization at which a student took external subjects [Page 12] and/or acquired external qualifications [Page 14].

External organizations can be schools, universities, or other educational institutions.

**Use**

You can enter the grades earned by students in external subjects or the qualifications they acquired at an external organization in the infotype *External Transcripts* (1719). For more information, see Maintenance of External Transcripts [Page 53].

**Structure**

An external organization (object type EO) imparts knowledge in external subjects (object type SU) and awards external qualifications (object type EQ). These objects are therefore interrelated.

You access the functions for maintenance of external organizations by choosing Student Lifecycle Management → Curriculum → Educational Background → External Organization from the SAP menu. You use the object manager [Page 26] when you create and maintain external organizations. The object manager is a convenient user tool that helps you find and select external organizations.

You can create and maintain the following external organization information:

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Information Content</th>
<th>Technical Information Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object information</td>
<td>Abbreviation and name of the external organization</td>
<td>Object (1000)</td>
</tr>
<tr>
<td>External organization data</td>
<td>• Code of the external organization within the relevant coding system</td>
<td>Ext. Organization Data (1757)</td>
</tr>
<tr>
<td></td>
<td>• Category and classification of the external organization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Whether or not the external organization is an accredited institution</td>
<td></td>
</tr>
<tr>
<td>General description</td>
<td>User-defined text</td>
<td>Description (1002)</td>
</tr>
<tr>
<td>Address</td>
<td>• Address</td>
<td>Address (1028)</td>
</tr>
<tr>
<td></td>
<td>• Phone number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Country key</td>
<td></td>
</tr>
<tr>
<td>Relationships</td>
<td>• Relationships between external organizations</td>
<td>Relationships (1001)</td>
</tr>
<tr>
<td></td>
<td>• Subjects offered</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Qualifications offered</td>
<td></td>
</tr>
<tr>
<td>Mail address</td>
<td>E-mail address</td>
<td>Mail Address (1032)</td>
</tr>
</tbody>
</table>
### External Organization Grading Scales

You can assign external organizations the following grading scales:

- Grading scale for external subjects
- Grading scale for external qualifications
- Grading scale for transcript averages

If you do not enter a grading scale, the system uses the grading scale assigned to the next higher-level external organization. Grading scales are ranked as follows:

1. Grading scale of the external organization
2. Grading scale of the next higher-level external organization
3. Country-specific scale (only for external subject grading scale)
4. Universal scale
5. SAP standard scale

(If no grading scale is defined in 1 but in 2, the system uses the scale specified in 2.)

You can define a special grading scale for external subjects and external qualification as additional data in the infotype Relationships (1001). This special grading scale overrides the general subject and qualification grading scale defined for the external organization.

### 1.1.1.5 External Qualification

#### Definition

Qualification that a student has acquired at an external organization [Page 107].

#### Use

You store external qualifications in student master data in the infotype External Transcripts (1719). External qualifications can be recognized as equivalents to modules or internal qualifications.

#### Structure

Students acquire external qualifications (object type EQ) at an external organization (object type EO). A relationship therefore exists between the external qualification and the external organization.

You access the functions for creating and maintaining external qualifications from the SAP menu by choosing Student Lifecycle Management → Curriculum → Educational Background → External Qualification. You use the object manager [Page 26] when you create and maintain external qualifications. The object manager is a convenient user tool that helps you find and select external qualifications.

You can maintain the following infotypes for an external qualification:

- Object (1000)
- Relationships (1001)
- Description (1002)
- Qualification Data (1708)
In the Relationships infotype, you can enter a special grading scale for external qualifications as additional data. The special grading scale overrides the general grading scale defined for the external organization [Page 107] in the infotype Scales/Credits (1755).

1.1.1.6 Internal Qualification

Definition

A qualification that students acquire in the course of their studies.

Use

An internal qualification is awarded to students following successful completion of a module or program. An internal qualification can also be a prerequisite for a module or program.

Structure

An internal qualification (object type CQ) is awarded to students upon successful completion of a module or program. An internal qualification can also be an attendance prerequisite for a module or program.

The object Study is a technical object which enables you to map multiple programs in the system. When a student books a program, the system creates the required relationships. The object Study does not appear in the user interface.

You can maintain the following infotypes for an internal qualification:

- Object (1000)
- Relationships (1001)
- Description (1002)
- Qualification Data (1708)
- Evaluation (1710)
- Disciplines (1744)

See also:

Creating/Maintaining Internal Qualifications [Page 106]
1.1.1.7 Individual Work

Definition

Individual work or job that a student takes on during his/her studies.

Individual work can be a:

- Term paper
- Dissertation
- Work/study project

Use

The *individual work* object (object type CI) allows you to enter data on individual work assignments and work/study projects that students complete during their studies. Individual work refers to a specific student or group of students.

Students working toward a PhD must submit a doctoral dissertation. Each student therefore produces a piece of individual work.

Structure

Individual work (object type CI) either relates to a module [Page 87] (object type SM) or business event type [Page 25] (object type D). You can assign the individual work items to modules or business event types in the module catalog [Page 76], and maintain their data there. You can only assign an individual work item to a module or business event type that has a category designated as individual work.

Your system administrator defines a category as *individual work* in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Individual Work → Set Up Categories.

You assign the category to a module in the infotype *Module Data* (1746) and to a business event type in the infotype *Category* (1731).

When a lecturer or instructor creates individual work for a module or business event type, (s)he can create a new *individual work* object for each topic. This would be the case if a term paper has different topics.

The *individual work* object contains the following infotypes:

- *Object* (1000)
- *Relationships* (1001)
- *Description* (1002)
- *Web Link* (1061)
- *Sessions of Offering* (1739)
- *Individual Work* (1774)
- *Submission Dates* (1775)

Integration

Module Booking Process

You can assign an individual work item to a student in the module booking process. If the lecturer or instructor has created items of individual work for a module (representing the different term paper topics), the student can choose a topic from these individual work items. You can also create an individual work item during the module booking process.

If the student has to submit a term paper or dissertation, you can choose the relevant individual work item and then maintain the topic.
**Student File**

You can view the individual work item assigned to a student in the student file using program content [Page 90].

### 1.1.1.8 Module Group

**Definition**

Combination of modules that enable you to structure a program of study.

**Use**

In a module group (object type CG), you can combine modules (object type SM) and module groups. You can assign module groups to the programs offered at your university and set up a program structure.

**Structure**

A module group has the following dependencies:

- A module group can be assigned to one or more programs (object type SC)
- A module group can be assigned one or more module groups
- A module group can be assigned modules (object type SM)

When you create a new module group or maintain an existing module group, you create or change the following infotypes for the module group:

- *Object* (1000)
- *Relationships* (1001)
- *Description* (1002)
- *Module Group Data* (1733)
- *Disciplines* (1744)

**See also:**

Creating/Maintaining Module Groups [Page 88]

### 1.1.1.9 Organizational Unit

**Definition**

A functional unit of a university, such as a faculty. Depending on how tasks are organized, an organizational unit of a university can be an institute, a department, or a research team.

**Use**

You use organizational units (object type O) to map your university's functional units. By assigning organizational units to one another, you create an organizational structure.

You must define the top organizational unit [Page 73] in the Student Lifecycle Management system. This is usually the root organizational unit of your organizational structure.

> Student Lifecycle Management uses the functions of the Organizational Management component for creation and maintenance of organizational units. You can access these functions from the SAP menu by choosing *Student Lifecycle Management → Environment → Organizational Management → Organizational Plan → Organization and Staffing*. For more information, see Application Help in Organizational Management.
1.1.10 Assessment

Definition

Contains the process rules that stipulate what is required for completion of a module, stage or program (see also Assessment.

Use

You can define assessments for the following objects of the academic structure:

- Module (object type SM)
- Program (object type SC)

Assessments (object type CE) are used to monitor the completion of modules, stages, and programs.

For each assessment, you create a scheduled assessment [Page 127]. The assessment and associated scheduled assessment provide the basis for the assessment process [Page 129].

You can create assessments as follows:

- To create assessments for a module or program, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Edit Assessments.
- Assessments for a module can also be created in the module catalog
- Assessments for a program can also be created in the program catalog

When you create a CE object, the system uses the task PICE (Student Lifecycle Management: Assessment).

Structure

The object assessment (object type CE) is linked to a program and stage (if specified), or to a module. Since the assessment object always belongs to only one higher-level object, an assessment can only be linked to one program or one module.

The assessment object contains the following infotypes:

- Object (1000)
- Relationships (1001)
- Description (1002)
- Sessions of Offering (1739),
  In the above infotype, you specify the academic years and assessment periods in which the assessment is normally conducted. You can create a concrete scheduled assessment using the general sessions of offering of an assessment as a basis.

For each session in which a module is offered, you can specify multiple sessions of offering for an assessment, for example:

- Regular assessment period (after the class period ends)
- Repeat exam period (before the next session starts)

In this case, you must define your own assessment periods and assign them to the appropriate period group.

If the assessment periods coincide the class periods, you do not have to create assessment periods but can use the class periods as assessment periods.

- Session Patterns (1751)
- Assessment Category (1766)
  This infotype contains the following fields:
  ○ Requirement catalog
  ○ Audit type
  ○ Stage
  ○ Assessment category

- Assessment Data (1767)
  This infotype contains the following fields:
  ○ Repetition type
  ○ Scale ID
  ○ Appraisal type
  ○ Exam profiles including the default profile

1.1.1.11 Student

Definition
A person who studies at a university.

Use
The student (object type ST) is the central object in Student Lifecycle Management. The personal data of persons applying for admission to your university is stored in a student master record. You use this master data in all processes related to the student.

When you create a student, the system automatically creates the associated business partner master record you need to manage this student’s account.

1.1.1.12 Program of Study

Definition
A program is an approved combination of academic activities (lectures, tutorials, practical sessions) that satisfies the requirements for a degree.

Use
You can map your university’s academic offerings by setting up programs in the system. When you register a student, you assign the student a program.

Structure
A program (object type SC) is offered by an organizational unit (object type O), and consists of modules [Page 87] (object type SM) and/or module groups [Page 88] (object type CG). You can arrange module groups in hierarchical order. A program uses rule containers [Page 116] (object type RC) and academic calendars [Page 9] (object type CA).

You can administer your programs by means of a program catalog [Page 74] which contains all the programs offered by an organization.

When you create or change a program, you edit the following infotypes of the program:
- Object (1000)
- Relationships (1001)
- Description (1002)
- Cost Distribution (1018)
You can split a program into stages, and thus map program levels like freshman, sophomore, junior, and senior in the system. If you want to view the stages of a program, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Stage Display.

See also: Creating/Maintaining a Program of Study [Page 86]

1.1.1.13 Module

Definition
A combination of business event types [Page 25] and the associated rules, which can be used in several programs [Page 19].

Use
You use modules to create generic, reusable templates for complex or similar academic events. You can use these templates in study plans and adapt them to individual student requirements.

Structure
You can assign business event types (object type D) to modules (object type SM) to define their academic content.

You can also assign business event offerings [Page 82] to modules. Modules represent general, long-term objects. However, business event offerings are related to a specific session.

If the module is assigned a category designated as individual work [Page 106], you can maintain individual work data for this module. You assign the required category in the Module Data infotype (1746). Your system administrator designates a category as individual work in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Individual Work → Set Up Categories.

You can assign a rule container [Page 116] (object type RC) to modules so that the system can perform checks in specific activities.

You can also assign modules an academic calendar [Page 9] (object type CA) containing the relevant dates and periods.

You can combine modules to module groups [Page 88] (object type CG) and set up a hierarchy. Module groups can be assigned to a program of study. You can assign modules to more than one module group and reuse their program contents. You can also assign modules directly to a program.

You can manage modules in the module catalog [Page 76] which displays all the modules of an organizational unit. In the module catalog, you can assign business event offerings to modules.

When you create a new module or maintain an existing module, you create and change the following infotypes of the module:

- Object (1000)
- Relationships (1001)
- Description (1002)
1.1.1.14 Academic Unit w/o Dates

Definition

The academic unit w/o dates and business event can both be created from a business event type. Unlike business events, academic units w/o dates do not require a schedule or resources such as rooms and instructors.

An academic unit w/o dates can be a distance study offering or a course offered via the Internet.

Use

The system creates an academic unit w/o dates when you create an event without a schedule and resources.

It also creates an academic unit w/o dates when you create an unscheduled business event, that is, a business event without a set schedule. If you subsequently enter a schedule, the system changes the academic unit w/o dates to a business event.

The academic offerings of a university consist of business events and academic units w/o dates. You create and schedule business events, and create academic units w/o dates when you maintain a business event offering. You can book persons for an academic unit w/o dates as soon as it exists in the system.

The delivery mode of the business event type (object type D) determines whether the offering is a business event or an academic unit w/o dates. When you create an academic unit w/o dates (object type EL), the system offers only those business event types that have the appropriate delivery modes. When you create an academic unit w/o dates, you can add data to the business event type default values.

You can create your own academic offerings in Student Lifecycle Management by combining business events and academic units w/o dates to a business event package (object type SE). This has the advantage that students can simultaneously book all academic offerings within a package instead of booking events and academic units w/o dates separately.

Structure

An academic unit w/o dates (object type EL) contains the following infotypes:

- **Object** (1000)
- **Relationships** (1001), for the following objects:
  - Campus (024)
  - Resource (520)
Differentiation of Business Events and Academic Units w/o Dates

<table>
<thead>
<tr>
<th>Business event</th>
<th>Academic unit w/o dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires resources such as instructors and rooms.</td>
<td>Does not require resources.</td>
</tr>
<tr>
<td>Requires a schedule (date, and start and end times).</td>
<td>Does not require a schedule.</td>
</tr>
<tr>
<td>Takes place at a specific campus.</td>
<td>Is independent of the campus.</td>
</tr>
<tr>
<td>Has capacity restrictions.</td>
<td>Does not have capacity restrictions.</td>
</tr>
</tbody>
</table>

### 1.1.1.15 Business Event

#### Definition

A business event is a concrete event with set start and end dates which has been created from a business event type [Page 25]. It takes place at a specific campus, and requires resources such as rooms and instructors.

#### Use

The academic offerings of a university consist of business events and academic units w/o dates [Page 21]. You create business events and academic units w/o dates, and schedule business events when you set up a business event offering [Page 82]. You can book persons for a business event as soon as it exists in the system.

The delivery mode of the business event type (object type D) determines whether the offering is a business event or an academic unit w/o dates. When you create a business event (object type E), the system offers only those business event types that have the appropriate delivery modes. Apart from the business event type data the system uses when you create an event, you must enter additional data such as location, schedule, required resources, etc.

You can build your own academic offerings in Student Lifecycle Management by combining business events and academic units w/o dates to a business event package [Page 23] (object type SE). This has the advantage that students can book all the academic offerings within a package at once instead of having to book events and academic units w/o dates separately.

#### Structure

A business event (object type E) contains the following infotypes:

- **Object (1000)**
- **Relationships (1001)**, for the following objects:
  - Campus (024)
  - Resource (023)
Differentiation of Business Events and Academic Units w/o Dates

<table>
<thead>
<tr>
<th>Business event</th>
<th>Academic unit w/o dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requires resources such as instructors and rooms.</td>
<td>Does not require resources.</td>
</tr>
<tr>
<td>Requires a schedule (date, and start and end times).</td>
<td>Does not require a schedule.</td>
</tr>
<tr>
<td>Takes place at a specific campus.</td>
<td>Is independent of the campus.</td>
</tr>
<tr>
<td>Has capacity restrictions.</td>
<td>Does not have capacity restrictions.</td>
</tr>
</tbody>
</table>

**1.1.1.16 Business Event Package**

**Definition**

A business event package is a combination of academic offerings ([business events](Page 22) and [academic units w/o dates](Page 21)) which are offered for a [module](Page 87) in an academic session.

**Use**

When you build business event packages, you can book students for all business events in the package in one operation instead of booking them separately for individual business events. You can build business event packages from business events and/or academic units w/o dates.

The business events **Lecture: Basics of Computer Science 01** and **Tutorial: Basics of Computer Science 01** are combined to the business event package **Basics of Computer Science 01**. The business event package **Basics of Computer Science 01** is assigned to the module **Basics of Computer Science**.

Students who want to book the module **Basics of Computer Science** must book the two business events **Lecture: Basics of Computer Science 01** and **Tutorial: Basics of Computer Science 01** in the business event package.

Business event packages offer functions that enable you to:

- Set tuition fees at levels below the module level. This enables you to calculate different fees for individual business event packages.
- Define the rules for business event package booking per [rule container](Page 116).
- Define the campus at which a business event package is held.
- Maintain an academic calendar for the business event package.
- Maintain the capacity per business event package
- Maintain a pattern per business event package

When you maintain a business event offering, you can also create and maintain business event packages and the associated academic events (business events and academic units w/o dates).

**Example 1:**

The business event package *Chemistry 01* consists of the lecture *Basic Chemistry 1* and the tutorial *Basic Chemistry 1*.

The business event package *Chemistry 02* consists of the lecture *Basic Chemistry 2* and the tutorial *Basic Chemistry 2*.

The package *Chemistry 01* has different periods and deadlines than *Chemistry 02* (different academic calendar). In addition, the fees for *Chemistry 01* are higher than for *Chemistry 02* (different categories).

**Example 2:**

The business event package *Chemistry 01* is offered for distance study. Students can access this academic offering via the Internet. This academic offering has no specific times or rooms. To map this in the system, you can assign an academic unit w/o dates [Page 21] (object type EL) to the business event package. The academic unit w/o dates has no schedule, and does not require any resources.

However, the business event package *Chemistry 02* is intended for classroom instruction. You assign it an academic offering that consists of business events (object type E).

**Structure**

You can assign business event packages (object type SE) to a module (object type SM). A business event package consists of business events (object type E) and academic units w/o dates (object type EL) offered by the university. When you assign business events and academic units w/o dates to a business event package, you can define the academic session and/or academic year in which the business event package is offered by assigning it an academic calendar [Page 9] (object type CA).

<table>
<thead>
<tr>
<th>System Relationship ID</th>
<th>Bottom-Up Relationship</th>
<th>Top-Down Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>020</td>
<td>Is specialization of</td>
<td>Is a generalization of</td>
</tr>
<tr>
<td>507</td>
<td>Consists of</td>
<td>Is an element of</td>
</tr>
<tr>
<td>512</td>
<td>Consists of</td>
<td>Is an element of</td>
</tr>
<tr>
<td>514</td>
<td>Is specialization of</td>
<td>Is template for</td>
</tr>
</tbody>
</table>
When you create a new business event package or maintain an existing business event package, you create and change the following infotypes for the business event package:

- **Object** (1000)
- **Relationships** (1001), for relationships with the following objects:
  - Rule container (object type RC)
  - Campus (object type F)
  - Academic calendar (object type CA)
- **Cost Distribution** (1018)
- **Capacity** (1024)
- **Sessions of Offering** (1739)
- **Business Event Packages** (1743)
- **Offering Patterns** (1751)

The infotype **Sessions of Offering** (1739) is also used for the object types *module* and *business event*.

### 1.1.1.17 Business Event Type

**Definition**

Business event types are elements of a module. A business event type is a generic description of an academic event without set dates.

**Use**

Business event types [Page 22](#) (object type E) and academic units w/o dates [Page 21](#) (object type EL) are created from a business event type (object type D). Business events have a schedule, require resources such as instructors and rooms, and take place at a specific campus. Academic units w/o dates, however, do not require a schedule, resources, or a campus.

The attributes which are typical for all academic events of a specific type are stored in the business event type. The delivery mode of the business event type determines whether it is a blueprint for business events or academic units w/o dates.

Business event types are elements of a module which serve as templates. The system uses the business event type data as default values when you create or plan business events or academic units w/o dates. You can overwrite these default values in the business events or academic units w/o dates.

**Structure**

In **Student Lifecycle Management**, the business event type (object type D) uses the following additional infotypes which are not used in Training and Event Management:

- **Category** (1731)
  - Infotype 1731 contains the following fields:
    - **Category**
      - The category determines the form in which a business event is presented (lecture, tutorial, lab, etc.).
      - The category also defines whether or not you can create individual work [Page 106](#) for this business event type.
○ **Teaching method**
  The teaching method describes the way in which the content of a module or business event type is offered (classroom instruction, distance study, etc.).

○ **Delivery mode**
  The delivery mode determines how the content of an academic event is presented to students (in a lecture, as a tutorial, in an e-learning session, etc.).
  The delivery mode also determines whether you have to create a business event or an academic unit w/o dates for the offering.

○ **Attendance compulsory**
  Defines whether attendance is mandatory for this business event type.

  ● **Contact Hours (1753)**
    Infotype 1753 contains the fields `Contact hours` and `Contact hours unit`. In this infotype, you define the anticipated number of teaching hours required for an academic event.

### 1.1.2 Object Manager

**Use**

The object manager provides a uniform editing interface for object search and selection in the numerous transactions and components it offers.

In *Student Lifecycle Management*, you can use the object manager to find organizational units, programs, and students, for example.

**Prerequisites**

You are familiar with the application’s validity concept. The validity concept determines which objects the system looks for when you conduct a search.

**Features**

- The object manager consists of a **search area** and a **selection area**.
• The **search area** offers one or more search functions, for example **Search term** and **Structure search**, for each object type. These search functions are indicated by an icon. The object type itself can also have a search function. Object types are indicated by the object type icon.

• In the search area, you can create search variants so that you can use specific sets of search criteria and lists of hits more than once. Search variants are indicated by an icon.

• In the **selection area**, the system displays the objects that match the criteria specified in the search area. Depending on the search function, this can be a list of hits or a structure.

• With and , you can scroll through the previous search results in the selection area.

• With , you can zoom in or zoom out the selection area and display several hits. The search area is then hidden or displayed.

The system saves the screen area size and object selection you last used, and displays these settings the next time you call the transaction.

You can clear the user-defined settings and the last object selection using report RH_DELETE_OM_USER_SETTINGS. Note that these settings are cleared in all applications. For more information, read the report documentation.

**See also:**
Finding/Selecting Objects [Page 27]
Using Search Tools [Page 27]
Using Search Variants [Page 29]

1.1.2.1 Finding/Selecting Objects

**Use**

In the **Search area** you can search for one or more objects that you want to display or edit.

For each object type there are various **search functions**, for example:

• Search Term

• Structural Search

• Free Search

**Prerequisites**

Objects you are searching for must already exist. Create new objects as required.

The required object types and search functions are set up.

**Procedure**

1. In the **search area** select one of the available search functions and if necessary enter the required selection criteria.

   In the **selection area** the system displays all found objects with the corresponding object type, either as a list or as a structure.

2. Double-click on the required object.
1.1.2.2 Using Search Tools

Use

With the search tools for each object type you can search for objects in various object type-specific ways. These search tools are marked with 🟢. In addition, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.

Prerequisites

You are familiar with how the search tools are assigned.

- In the search area, the object type itself can contain a search tool. The object types are marked with the respective object type-specific symbol.
- Search tools can be positioned under the corresponding object type. In that case it is marked with 🟢.

Procedure

Searching for Objects Using a Search Term

1. Choose Search Term (or the required object type, if it has this search function).
   The Search for <object type> dialog box appears.
2. Enter a name. This can be a name, abbreviation or numeric ID. You can also search using the entry *.
3. Restrict the number of hits, if required. Enter whether the object you are looking for is directly or indirectly assigned to another object.
   The results of the search are displayed in the selection area. The display in the overview and detail areas does not change.
5. If necessary, you can start another search for the same object type and then choose 🖼 Insert to add the new hits to the first results in the selection area.
6. Double-click on the required object in the selection area.

Searching for Objects Using Free Search

The Free Search search tool uses the InfoSet Query.

1. Choose Free Search (or the required object type, if it has this search function).
   The Find Objects of Type <Object type> dialog box appears. For further information, see HR in the InfoSet Query. After the search, the system displays the search results in the selection area.
2. Double-click on the required object in the selection area.

Searching for Objects Using Structure Search

1. Choose Structure Search (or the required object type, if it has this search function).
   In the selection area the system displays all found objects of the relevant object type in a tree structure, ordered according to their assignment in the organizational plan.
   If necessary, you can refresh the hits displayed in the selection area using 🔄. This is recommended, for example, if you have created new objects shortly before.
2. Expand the structure until the required object is revealed.
   To display unrelated objects, choose 🛡.
3. Double-click on the required object in the selection area.
1.1.2.3 Using Search Variants

Use

In some search functions, for example Search Term, you can restrict the number of hits by using a combination of selection criteria. You can then save such a combination as a search variant so that you can use it again. You can also delete a search variant again, if necessary.

Procedure

Creating Search Variants

1. Use one of the search functions to search for objects.
   The system displays the hits in the selection area.
2. Choose and enter a name. Choose .
   The system saves the search criteria as a search variant and assigns them to the corresponding object type in the search area. The search variant is marked with .
3. Select the search variant you created and choose . You can check your search criteria.

Searching for Objects Using a Search Variant

1. Select a search variant.
   The hits are displayed in the selection area.
2. Double-click on the required object.

Deleting Search Variants

1. Select the search variant that you want to delete.
2. Choose .
   The search variant is deleted.

1.1.3 Object Selection Using a Selection Method

Use

Selection methods enable you to select a specific set of objects, such as students, programs or modules, in a Student Lifecycle Management application.

Selection methods are used in program type progression, mass de-registration, or when defining subrequirements. For information on the selection methods for these applications, see:

- Selection method for program type progression [Page 30]
- Selection method for mass de-registration [Page 31]

Integration

You must assign the selection methods you want to use in a specific Student Lifecycle Management application to an application-specific selection method group in Customizing (see Prerequisites). In this way, you can easily integrate the selection methods you have implemented in a specific application.

The standard system contains the following selection method groups:

<table>
<thead>
<tr>
<th>Application</th>
<th>Selection Method Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program type progression</td>
<td>PRGR</td>
</tr>
<tr>
<td>Mass de-registration</td>
<td>DER1</td>
</tr>
<tr>
<td>Subrequirements</td>
<td>AUDS</td>
</tr>
</tbody>
</table>
Every selection method contains one or more selection variants. You can use a selection variant to fill the required parameters of a selection method from the application, and thus select a specific set of objects.

A selection method for program type progression may contain a hold parameter. With the selection variant, you can specify the actual hold.

Every selection method is assigned an object type in Customizing. The assigned object type defines the type of objects returned by the associated selection methods. A selection method appears as a possible entry in a selection method group only if the selection method supports the object type assigned to the selection method group.

**Prerequisites**

You make the settings you require for selection methods in Customizing for *Student Lifecycle Management* in the section *Student Lifecycle Management Processes* → *General Settings* → *Selection Methods*:

- You must assign the required selection methods to the respective selection method group so that they can be used in the application. You make this setting in the IMG activity *Assign Selection Methods to Selection Method Groups*.

- You can implement additional selection methods using business add-in HRPIQ00SELMETHOD (IMG activity *BAdI: Selection Methods*).

- In Customizing, you will also find example source code which you can use to integrate selection methods in a customer-specific program.

### 1.1.3.1 Object Selection for Program Type Progression

#### Use

Before you can execute *program type progression* [Page 136], you must enter the selection method and selection variant you want to use for object selection on the selection screen of the progression program.

You want to execute program type progression. Only students with the customer status *Passed mid-term exam* should be selected. You therefore choose a selection method which chooses students according to their study status. You enter the appropriate status as a parameter in the selection variant.

#### Integration

Every selection method contains one or more selection variants. You use the selection variant to fill the required parameters of the selection method you have chosen. For example if the selection method contains a hold parameter, you can specify a hold from the application using a selection variant.

*Program Type Progression* uses only the selection methods of selection method group PRGR (*program type progression*). You must therefore assign all the selection methods for program type progression to selection method group PRGR. You make this setting in Customizing for *Student Lifecycle Management* in the section *Student Lifecycle Management Processes* → *General Settings* → *Selection Methods* → *Assign Selection Methods to Selection Method Groups*.

You can then choose the selection methods which are assigned to selection method group PRGR on the *Program Type Progression* selection screen. In the standard system, selection method group PRGR is assigned the following selection methods:

- User-defined search 1 (ST01)
- Personal data and status (STAT)
- Students with a sessional registration (STRE)

You must implement any additional selection methods you need in Customizing using business add-in HRPIQ00SELMETHOD.
You can only execute program type progression if programs of study and registered students exist in the system. In the system, selection method group PRGR is assigned to the study object type (CS). This is because the study object has a 1:1 relationship with a program object (object type SC) as well as with a student object (object type ST). Because every study object is linked to exactly one program object (see Relationships infotype (1001) for CS object with relationship A 514 (is a specialization of)) and the study object is assigned to selection method group PRGR, selection by program is possible. It is not advisable to assign the student object (object type ST) to selection method group PRGR because a student can be registered for several programs some of which may already have been completed.

You can access the documentation for an implemented selection method by choosing (Information).

1.1.3.2 Object Selection for Mass De-registration

Use

Before you can execute mass de-registration [Page 56], you must enter the required selection method and an associated selection variant on the selection screen of the mass de-registration program.

You want the system to automatically de-register all the students in the Mathematics program who are not registered or on leave of absence, and therefore do not have a current sessional registration. To do so, you choose a selection method which selects students without a sessional registration. In the selection variant of this selection method, you enter the current academic session and the program. The mass de-registration program then chooses the required students based on the given selection criteria.

If no selection variant exists for the selection method, you can create one on the selection screen of the mass de-registration program. Every selection method can have several selection variants. You use the selection variant to fill the required parameters of the selection method you have chosen. If, for example, the selection method contains parameters for the academic year and session, you can use the selection variant to specify the year and session from the application.

Integration

The mass de-registration program uses only selection methods of selection method group DER1 (mass de-registration). You must therefore assign all the selection methods you want to use for mass de-registration to selection method group DER1. You make this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → General Settings → Selection Methods → Assign Selection Methods to Selection Method Groups.

The selection methods which are assigned to selection method group DER1 are then offered as possible entries on the Mass De-registration selection screen. In the standard system, selection method group DER1 is assigned the following selection methods:

- Students without a sessional registration (DE00)
- User-defined search 1 (ST01)
- Personal data and status (STAT)

You must implement any additional selection methods you need in Customizing using business add-in HRPIQ00SELMETHOD.
Every selection method you use for mass de-registration must return objects which belong to the object type study (CS) because, in the SAP System, a de-registration activity always refers to a program and thus to a study object. The study object type is therefore assigned to selection method group DER1.

You can access the documentation for an implemented selection method by choosing (Information).

### 1.1.4 Archiving in Student Lifecycle Management

#### Use

Archiving frees up space and improves performance of the system. You can archive the following Student Lifecycle Management data:

- Student master data (student business partners, contract objects, contract accounts, and related persons)
- Study data
- Activity documents
- Lower-level appraisals
- Fee calculation documents

#### Integration

The FI-CA component contains archiving functions for FI-CA documents and FI-CA correspondence.

#### Prerequisites

You have activated the required archive infostructure. You make this setting in Customizing for Student Lifecycle Management under Basic Settings → Tools → Data Archiving.

#### Activities

You can access the archiving functions from the SAP Menu by choosing Student Lifecycle Management → Tools → Data Archiving.

You must set an archiving flag for the following data before you can archive it:

- Study data
- Student master data
- Lower-level appraisals

### 1.2 Business Processes in Student Lifecycle Management

The business processes in Student Lifecycle Management can be grouped into the following areas:

- Student Administration
- Student Accounting
- Academic Structure
- Academic Records
- Processes in Student Lifecycle Management
- Roles in Student Lifecycle Management
1.2.1 Student Administration

The numerous functions and processes offered in Student Lifecycle Management enable you to process and manage the data of the students at your university in all stages of their studies. Student Lifecycle Management maps all processes of student administration from admission and registration, to progression, re-registration, change of program, and de-registration.

The Student File is the most important editing interface for student master and program data.

See also:
Program Data in the Student File [Page 38]
Maintenance of Student Master Data [Page 48]

1.2.1.1 The Student as a Business Partner

The Student Lifecycle Management system creates the HR object student (object type ST) and an SAP business partner for each student. When you create a student, the system assigns him/her the following business partner roles:

- Student
- Contract partner

The term student is the superordinate term for all persons who apply to the university and pursue their studies there.

1.2.1.1.1 Student Identifiers

Student Lifecycle Management uses the following identifiers for students:

- Object ID [Page 33]
- Student number [Page 34]
- Business partner number [Page 35]

Depending on customer requirements, the student number and business partner number may be identical. In configurations like this, you must be aware of the fact that the two number ranges may overlap.

Displaying Technical Information

You can display the three identifiers of a student in the student file or in student master data. To do so, choose a student and then choose Utilities → Technical Information.

1.2.1.1.1.1 Student Object ID

The object ID is the technical key for the object student (ST): It has the following attributes:

- 8-digit numeric key
- Key field in database tables for the object student
- The system does not display the object ID in Student Lifecycle Management dialog transactions.
- When you create a student using a dialog transaction, the system supports only internal object ID assignment for the object type student (ST).
- The object ID cannot be changed once it is assigned.
- Students can only be created for the active plan version.
**Standard Number Range Settings for the Object ID**

We recommend that you use a numbering system for Student Lifecycle Management which is valid for all plan versions. As this Customizing setting applies to all HR object types, you first must make sure that all departments that use HR object types have agreed to this setting. These include the components Organizational Management, Personnel Development, Training and Event Management, etc.

You should use object type-specific numbering for the object type student (ST), if possible.

1. Define/check the number assignment in Customizing for Student Lifecycle Management by choosing **Basic Settings → Number Range Maintenance → Set up Number Assignment for All Plan Versions**.
2. You can create a new entry for the object type student in Customizing for Student Lifecycle Management by choosing **Basic Settings → Number Range Maintenance → Maintain Number Ranges**.
   - If you use a number assignment that is valid for all plan versions, create a new entry for subgroup $$ST$$.
   - If you use a number assignment that is not valid for all plan versions, create a new entry for subgroup $$PVST$$. PV represents the active plan version 01.

Save the new entry, and create a new internal number range interval IN, for example 00000001 to 99999999 or 50000000 to 99999999.

You do not have to create the external number range interval EX for students unless you want to assign the object ID externally for initial data transfer.

**1.2.1.1.1.2 Student Number**

The student number is one means of identifying students in Student Lifecycle Management.

- In the *Student Number* field, you can enter an up to 12-character alphanumeric key.
- The student number is stored in the field SHORT of infotype 1000.
- The standard SAP System only supports numeric student numbers. If you do not want to use all 12 digits, you have two options:
  - You can create number range intervals so that all numbers start with a zero. A 10-digit number then ranges from 00000000001 to 00999999999 although all 12 digits are used and displayed.
  - You also can use and fewer than 12 digits. A ten-digit number then fills the first 10 spaces of the student number field. The last two spaces are empty.
- For numeric student numbers, you can use a standard function which allows internal and external assignment of student numbers.
- You may not use different number range intervals for different categories of students.
- You can also use alphanumeric student numbers, but then have to implement a business add-in to assign internal numbers or check external number assignments (see below).
- The student number is an attribute of the object student (object type ST). It retains its validity throughout the entire object validity period. The system ensures that each student number is used only once. Each student is assigned a unique number.
- The student number is not used as a key field for database tables.
- The student number can be changed with transaction PIQSTU1.

You have to decide whether you want to use numeric or alphanumeric student numbers.
Numeric Student Numbers

If you use numeric student numbers, proceed as follows:

1. Decide how many places you need to store and display your student numbers, and whether you wish to use internal and/or external numbers. You make the required settings in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Student Numbers and Object IDs → Define Method for Student Number Assignment.

2. Define two number range intervals. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Student Numbers and Object IDs → Standard Functions for Assignment of Student Numbers → Define Number Range Intervals for Student Numbers.

   You can define a ten-digit numeric key with an external number range (EX: 1000000001 – 1999999999) and an internal number range (IN: 1 – 0999999999).

   EX 001000000001 – 001999999999, flagged as external
   IN 000000000001 – 000999999999

3. Define the numbers ranges you wish to use in Student Lifecycle Management. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Student Numbers and Object IDs → Define Internal and External Number Ranges.

Alphanumeric Student Numbers

If you want to assign alphanumeric student numbers, you have to implement the business add-in HRPIQ00_ST_NUMBER. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Student Numbers and Object IDs → BAdI: Student Number Assignment.

1.2.1.1.3 The Student’s Business Partner Number

The business partner number is the technical key which identifies the business partner. You can find the business partner number via the student number. The business partner number has the following attributes:

- Ten-character alphanumeric key
- Key field for business partner database tables
- The business partner number is displayed in business partner (BP) and Contract Accounts Receivable and Payable (FI-CA) transactions.
- The business partner number cannot be changed once it has been assigned.
- When you create a student, the system automatically creates a business partner with a defined business partner grouping. The number is assigned according to the Customizing settings. If the case of external assignment, the user does not have to perform any actions; the terms "internal and external assignment" are used only for the business partner number range, and not for the user or the student number. The system will allow you to overwrite an internally assigned number with an external number if you have implemented the appropriate business add-in.
- A business partner number range is assigned to a business partner grouping. For the business partner grouping, you can use either external or internal number range assignment (if you take into account the number range intervals for business partners).

There are three different ways of setting up the business partner number.

- Assign (different) business partner numbers using internal assignment.
- Use the student number as the business partner number.

Find out which method best suits your needs.
Assigning (Different) Business Partner Numbers Using Internal Assignment

In this standard method, the number interval (for example, the number range interval 8000000000 to 8999999999) is defined for the student’s business partner. Business partner numbers are set up independently of other numbers. You only have to decide if you want to use a separate business partner grouping and/or number range interval for students.

If you want to assign business partner numbers using internal assignment, you have to make the following settings:

1. Define/check the internal number range you wish to use. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Number Ranges.
   Define an internal number range interval (for example, ST 8000000000 – 8999999999).
   The number range must be internal, which means you must not set the External indicator.

2. Define/check the business partner groupings you wish to use for students. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Groupings and Assign Number Ranges.
   Define the business partner grouping using a key (for example 0006), and assign the number range you defined in the previous step.

3. Define the standard business partner grouping for students: You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → The Business Partner in Student Administration → Define Standard Business Partner Grouping for Students.
   Enter the business partner grouping you defined (for example 0006) in the line for CAMPU and BPGRP.

Using the Student Number as the Business Partner Number

If you want to use this setting, you have to implement a business add-in which ensures that the student numbers and business partner numbers are consistent.

Prerequisite

- You must reserve the student business partner numbers for student numbers. We therefore recommend that you define a business partner grouping and number range interval which you use only for students.
- The student number cannot be changed after a student has been created.
- If you use only ten digits for the student number, you must define a student number interval in which the first two digits are not used. The first two digits are then always 00.

You have set up the student numbers as described above:

EX 001000000001 – 001999999999, flagged as external
IN 000000000001 – 00999999999

Now create the interval 0000000001 – 1999999999 for student business partners, and lock this interval so that it cannot be used by other applications.

Procedure

1. Define/check the internal number range you wish to use. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Number Ranges.
   Define an internal number range interval (for example ST 0000000001 – 1999999999).
2. Define/check the business partner groupings you wish to use for students. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Groupings and Assign Number Ranges.

Define the business partner grouping using a key (for example 0006), and assign the number range you defined in the previous step.

3. Define the standard business partner grouping for students: You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → The Business Partner in Student Administration → Define Standard Business Partner Grouping for Students.

Enter the business partner grouping you defined (for example 0006) in the line for CAMPU and BPGRP.

4. Implement the business add-in PSCM_PARTNER. You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → The Business Partner in Student Administration → Assignment of Business Partner Numbers to Students → BAdI: Business Partner in Student Lifecycle Management.

   a. Use the following source code for student numbers in which only the first 10 digits are used (nnnnnnnnnn__):

   MOVE IV_STUDENT12 TO CV_PARTNER.

If you use this setting, internally assigned business partner numbers will be overwritten. Although the numbers are never actually used, the number range interval will be extended.

1.2.1.1.2 Editing Student Account Information

Student’s Contract Account (Student Account)

Creating the Student Account

The student’s contract account can be created automatically when a student is created.

You make the required settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Student Contract Account (Student Account) → (De)Activate Automatic Student Account Creation and Update.

Student Account Information

You can access information on the student account of a student using the Account Data function in student master data maintenance.

If you configure your system accordingly, several student account attributes are created automatically. You make the required settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Student Contract Account (Student Account) → Basic Settings for the Student Contract Account.

You can manually change the default settings for these attributes in the student’s contract account. If you make changes, you have to specify whether the system should use your manual settings or the default settings defined in Customizing.
Contract Object Data

- Contract objects can be created automatically when student master data is created.
  
  You make the required settings in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Student Contract Account (Student Account) → Basic Settings for the Student Contract Account → Maintain Contract Object Types To Be Created Automatically.

- Contract objects can also be created manually.
  
  To do so, go to the Contract Objects tab page in student master data maintenance and choose [Create Contract Objects] with the quick info text Create Contract Objects. You can also create contract objects in the student's contract account (see above).

Bank Data and Payment Card Data

To edit bank details and payment card data for a student, go to the Payment Transactions tab page in student master data maintenance.

1.2.1.2 Study Data in the Student File

Use

The student file is the central application for creating, displaying, and changing student master and study data. You access the student file from the SAP menu by choosing Student Lifecycle Management → Student File.

From the student file, you can execute Student Lifecycle Management activities such as registration [Page 41], change of program [Page 42], or de-registration [Page 43]. You can also monitor academic progression, process student applications, and maintain statuses and holds using this application.

The student file uses the object manager [Page 26], which is a convenient user tool for student search and selection.

In the object manager [Page 26] search area, you can also search by last selected students or create your own search variant.

Features

Student Master Data

You can branch to master data maintenance [Page 48] by choosing one of the functions located next to the student number:

- [Create Student]
- [Maintain Master Data]
- [Display Master Data]

You can also edit student master data directly using the application dialogs for master data maintenance.

When you create student master data, the SAP System automatically creates an SAP business partner as an integral element of the student object.

Study Data

Student study data is displayed on tab pages. The number, title, and order of tab pages in your system can differ from those described in the following as these settings may be adapted to
individual requirements in Customizing for Student Lifecycle Management in the section 
Student Lifecycle Management Master Data → Students → Adjustment of Tab Pages in the 
Student File.

Apart from allowing you to branch to master data maintenance, the student file also offers the following 
functions:

- **Admission** tab page: Provides an overview of the student’s applications for admission, and enables 
you to perform the activities for admission application processing and to execute admission.

- **Registration** tab page: Provides an overview of a student’s registered programs [Page 19], and 
enables you to perform the following activities:
  - [Registration [Page 41]] for a program
  - Leave of absence from a program
  - [De-registration [Page 43]] from a program
  - [Change of program [Page 42]]

- **General Data** tab page: Contains information on the student’s advisor and registration type, and on 
the organizational unit responsible for the program

- **Specializations** tab page: Provides an overview of a student’s academic specializations and their 
assignments

- **Applications** tab page: Provides an overview of the applications submitted by the student and the 
relevant processing information

- **Activity Documents** tab page: Provides an overview of the activities performed and the activity 
documents created for the student

- **Status** tab page: Contains an overview of a student’s status and the relevant assignments

- **Holds** tab page: Contains an overview of the holds set for the student and the relevant assignments

- **Program Type Progression** tab page: Provides an overview of a student’s progression in the selected 
program type

- **Program Progression** tab page: Provides an overview of a student’s progression in the selected 
program(s)

- **Qualifications** tab page: Provides an overview of a student’s transferred and conferred qualifications, 
and enables you to [confer qualifications [Page 45]]

- **Correspondence** tab page: Provides an overview of student-related correspondence

- **Requirement Catalogs** tab page: Enables you to assign [requirement catalogs [Page 145]] and define 
the main requirement catalog

- You can perform the following additional functions by means of the following pushbuttons or menu 
options:
  - Send an e-mail to a student
  - Display the student’s timetable
  - Display a message log overview
  - Display a student’s account balance
  - Go to payment at cash desk and fee calculation
  - Display the student’s [program content [Page 90]]
  - Display an overview of [student-related notes [Page 52]]
  - Display an overview of the student’s academic work
  - Enter death data for a student
1.2.1.2.1 Admission Application and Admission

Use

You can create an application for admission to a program and an admission for a student on the Admission tab page in the Student File [Page 38].

You can execute the following activities on this tab page:

- Create admission application (activity AD02)
- Change admission application (activity AD03)
  You can also display an admission application.
- Delete admission application (activity AD04)
- Execute admission (activity AD05)
- Reject admission application (activity AD06)
- Change admission (activity AD07)
- Change rejected admission application (activity AD08)
- Change of program in admission application (activity AD09)
- Change of program in admission (activity AD10)
- Undo rejected admission application (activity AD11)
- Undo admission (activity AD12)
- Withdraw admission application (activity AD13)
  This activity is used only if an applicant withdraws his or her admission application before admission is executed.
- Decline offer of admission (activity AD14)
  This activity is used if the applicant declines a place offer in a program of study.
- Revoke withdrawal/declination (activity AD15)
  This activity is used if the applicant revokes the withdrawal of an admission application or the declination of a place offer.

Prerequisites

You have made the required settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Admission, Registration, and De-registration.

Features

Withdraw Admission Application and Decline Offer of Admission Activities

When you choose the withdraw admission application or decline admission offer action which you can access from the Reject/Decline pushbutton, the system executes the following activity irrespective of the admission application status:

- If the status is created, the system executes the withdraw admission application activity.
- If the status is approved, the system executes the decline admission offer activity.

When the system performs these two activities, it also writes the relevant text to the status supplement field.

Undo Admission and Undo Rejected Admission Application Activities

When you choose the undo admission or undo rejected admission application action which you can access from the Undo/Reverse pushbutton, the system executes the following activity irrespective of the admission application status:
• If the status is approved, the system executes the *Undo Admission* activity.
• If the status is rejected/withdrawn or if there is no status supplement, the system executes the *Undo Rejected Admission Application* activity.

**Revoke Withdrawal/Declination Activity**
Depending on the status supplement, the system resets the admission application status as follows:

• Status supplement *admission application withdrawn*
  In this case, the system resets the admission application’s status to *created*.

• Status supplement *offer of admission declined*
  In this case, you can define whether or not the system should reset the admission application’s status to *created or approved* (= admitted) by making the appropriate entry in a dialog box. If you reset the status of the admission application to *approved*, the system performs the same VSR rule checks as it does for the *Execute Admission* activity.

**Date of Admission Application Receipt**
The *Date of (Admission Application) Receipt* field appears on the screen when you execute the following activities:

• Create an admission application
  When you create an admission application, the system defaults to the system date which can be overwritten.

• Change an admission application

• Execute an admission if no admission application exists for it

• Change an admission

• Change the program in the admission application

• Change the program in the admission

1.2.1.2.2 Registration

**Use**
Program registration is one of the activities you can perform for a student on the *Registration* tab page in the *Student File* [Page 38]. Registration is an activity and always refers to a specific academic session.

**Integration**
The SAP System always links a *student* [Page 19] (object type ST) with a *program* [Page 19] (object type SC) via the *study* object (object type CS). The *study* object therefore contains all of the student’s program registration data.

When you create an initial registration, the SAP System creates a *sessional registration* (infotype 1771 record for the *study* object) and a study segment (infotype 1769 record for the *study* object). When you create a re-registration, the SAP System creates a *sessional registration* but not a new study segment.

The study segment the SAP System creates for an initial registration is an open study segment with the end date 31.12.9999. When you create a de-registration or a change of program, the SAP System ends the study segment by entering the relevant end date. Thus, the study segment becomes a closed study segment. (You can cancel the study segment when you create a de-registration. This function is provided especially for cases in which the student does not take up the chosen course of study although (s)he has registered).

The SAP System records the registration activity you perform in an activity document which you can display on the *Activity Documents* tab page of the *Student File*. The *Activity Documents* tab page contains an overview of the activities for which the SAP System created an activity document.
Activities

To register a student for a program, proceed as follows:

5. In the Student File, choose the desired student using the Object Manager [Page 26].
6. Choose the Registration tab page.
7. Choose a program using the object manager or enter the desired program directly in the New Program field.
8. Choose Registration.

If the student is already registered for a program, the SAP System lists the registered program on this tab page. You can change this list display by specifying different selection criteria:

- If you select All programs, the SAP System displays the registration data for all programs in which the student is registered.
- If you select Program, the system displays the registration data for the program you enter in the field next to this option.
- If you choose Program Overview, the system displays a dialog box listing all programs in which the student is registered. This dialog box contains more detailed information than the list display which appears when you select All Programs.

If certain data is missing from the list, check whether you have set a filter for list display. To delete any filters that may be set, choose Set filter and then Remove filters.

1.2.1.2.3 Change of Program

Use

Change of program is one of the activities you can perform for a student on the Registration tab page in the Student File [Page 38]. A change of program involves de-registration [Page 43] from the old program and registration [Page 41] in the new program.

When you create a change of program, the SAP System closes the open study segment and creates a new study segment. When you create a change of program, you can simultaneously create a sessional registration (infotype 1771 for the study object).

Integration

The SAP System always links a student [Page 19] (object type ST) with a program [Page 19] (object type SC) via the internal study object (object type CS). The study object therefore contains all of the student’s program registration data. The SAP System therefore changes this data of the study object when you create a registration and de-registration.

The SAP System records the change-of-program activity you perform in an activity document which you can display on the Activity Documents tab page of the Student File. The Activity Documents tab page contains an overview of the activities for which the SAP System created an activity document.

Activities

To create a change of program for a student, proceed as follows:

9. Choose the desired student in the Student File.
10. On the Registration tab page, choose Program
11. Choose the program the student wants to withdraw from.
12. Choose a new program using the object manager, or enter the program directly in the New Program field.
13. Choose Change of Program.
The system displays a dialog box in which you can enter the change of program data. If you set the Create Sess. Registration flag in this dialog box, the SAP System will also create a sessional registration when it creates the new study segment.

1.2.1.2.4 De-registration

Use

Program de-registration is one of the activities you can perform for a student on the Registration tab page in the Student File [Page 38]. Here, you can also display, change or cancel a de-registration.

In the SAP System, you use a de-registration activity to end a student’s registration in a specific program. Student Lifecycle Management has two different types of de-registration, withdrawal and dismissal.

You can use the mass de-registration program [Page 56] to automatically de-register students who satisfy certain conditions.

Integration

The SAP System always links a student [Page 19] (object type ST) with a program [Page 19] (object type SC) via the internal study object (object type CS). The study object therefore contains all of the student’s program registration data. The SAP System therefore changes this data of the study object when you create a de-registration.

Prerequisites

You can perform a de-registration activity only for students who have a program registration.

Features

When you create a de-registration, the SAP System closes the open study segment for the program in which the student is registered. The SAP System thereby delimits the Study Segments infotype record (1769) for the study object (object type CS). The end date is the end of program registration date specified in the dialog box (either the end date of the last sessional registration or the given key date). The other de-registration data including the de-registration activity, de-registration reason, and de-registration key date are also entered in the delimited data record.

The SAP System records the de-registration activity you perform in an activity document which you can display on the Activity Documents tab page in the Student File. This activity document also contains the de-registration data you specified on the selection screen. The Activity Documents tab page contains an overview of the activities for which the SAP System created an activity document.

When you perform a de-registration activity, the SAP System cancels all sessional registrations which are after the end of program registration specified in the de-registration dialog box. For example, the system does this when you enter a key date in the dialog box which is before the end of program registration.

Activities

To de-register a student from a program, proceed as follows:

14. Choose the desired student in the Student File.
15. Choose the Registration tab page.
16. Choose the program in which the student is registered.
17. Choose De-registration and then either the Withdrawal or Dismissal activity.
18. In the dialog box which appears, enter the de-registration data.

○ If you set the Cancel Module Bookings flag in this dialog box, the SAP System performs the de-registration activity as well as a cancellation activity. The SAP System then cancels all module bookings whose validity period extends beyond the end of program registration specified on the selection screen.
If you set the `Cancel Study Segment` flag, the SAP System cancels the study segment it created for the initial registration or change of program when it executes the de-registration. This also automatically cancels all `sessional registrations` which are within this study segment. This function is provided especially for cases in which the student does not take up the chosen course of study although (s)he has registered. Also see the relevant notes and the example provided in the field help.

19. Choose (Save + Close).

1.2.1.2.5 Program Content

Use

When you edit program content, you can view the modules a student has booked. You can also book modules and cancel module bookings.

You can display a student’s program content in the student file [Page 38] by choosing (Program content) or Goto → Program content.

Features

- Overview of a student’s complete booking history (program modules) including a list of the relevant data with sort and filter functions
- Individual and mass booking of modules
- Selection of modules using the object manager
- Modification of existing bookings
- Display of detailed student information

Activities

**Booking history**

The Booking history tab page provides an overview of the modules the student has booked in the chosen program.

You can filter the data displayed, for example, according to academic year and session or booking status.

You can also sort the data, for example, by booking date. To sort the data, select the desired column and choose (Sort in ascend. order) or (Sort in descnd order).

**Single bookings**

Select a module using the object manager [Page 26]. Double click the module you want to copy to the Module details tab page. There, you can view the module data and the associated business event offering. Select single business events or a business event package. You can book the module directly by choosing Single booking.

If you want to book several modules, you first copy the module from the Module details tab page to the Booking dialog tab page using Copy. When you have copied all the modules you want, you book these using Save on the Booking dialog tab page. This includes the module(s) in the booking history. On the Booking dialog tab page, you can also cancel a booked module.

**Mass Bookings**

On the Selection tab page, you can search for the modules belonging to a specific program using Modules. The system displays the modules it finds in the Selected modules group box. You can select the desired modules and copy them to the Booking dialog with Copy.

Alternatively, you can enter individual modules and business event packages manually on the Selection tab page. You must first set the appropriate indicators.
1.2.1.2.6 Maintenance of Academic Specializations

Use

Academic specializations define the number of majors and minors in a program. You can assign students the subject (module group) combinations they must take as academic specializations.

You enter the academic specializations of a program in the infotype Program Data. In the infotype Module Group Combinations, you define which subject combinations the student can choose as academic specializations in his/her program.

Prerequisites

Your system administrator has made the required settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Module Groups.

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Student File.
   
   The Student File screen appears.

2. Select the student you want to process using the object manager.

   The system displays the academic specializations assigned to the student on the Specializations tab page.

1. To assign academic specializations to the selected student, choose (Change assignment) on the Specializations tab page.

   The Maintain Academic Specializations screen appears.

   Which academic specializations you can assign, depends on the settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Module Groups → Set Up Module Group Variant/Category Combinations. The settings you make here activate or deactivate fields and show or hide functions on the Maintain Academic Specializations screen.

2. Choose the academic year and academic session in which the specializations apply.

3. Choose the module group category and assign it a module group. You can use the Free search function.

4. In the field Priority, enter a priority. The Priority field is only ready for input if the Order indicator is not set in the Customizing activity Set Up Module Group Variant/Category Combinations (see above).

5. To check the academic specializations you have assigned, choose (Check).

6. Choose (Save).

Result

The system lists the academic specializations you have maintained on the Specializations tab page.

1.2.1.2.7 Conferring Qualifications

Use

In the student file on the Qualifications tab page, you can confer an internal qualification with the following uses on a student:

- Qualification for a program, that is, for program completion
  You can only select the programs in which the student is or was registered.

- Qualification for stage completion
  You can only confer this qualification if you offer programs with stages.
Qualification without a program reference

On the Qualifications tab page, the SAP system lists the qualifications that were conferred on and transferred to the student, as well as the qualifications which the student failed to achieve.

Integration

**Internal Qualification**

*Internal qualifications* (object type CQ) can represent a booking prerequisite for (other) modules. The SAP system can check this prerequisite based on the VSR rules when a module is booked.

**Transferred Qualification**

The SAP system automatically displays the qualifications that were transferred to a student in the equivalency determination application (transaction code PIQED). These qualifications are indicated by the *transferred* flag. Unlike conferred qualifications, you cannot change transferred qualifications in the student file.

**Graduation**

The system also uses qualifications in the graduation application. When you register a student for graduation, the system creates a relationship between the student and the respective qualification. Qualifications which have not been definitively conferred are flagged as “are being pursued”. Qualifications of this type are displayed in the usual way in the student file. However, these qualifications can only be changed in the graduation [Page 135] application.

**Prerequisites**

**Internal Qualifications**

Before you can confer qualifications, you must create *internal qualifications* (object type CQ). For more information, see Create/Maintain Internal Qualification [Page 106].

**Student Data**

You can create a qualification with a specific program reference only if the student is or was registered in this program.

**Customizing**

You have made the settings for qualification conferment in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Qualifications.

If you want to use qualifications to process graduation or stage completion, you must first define the use of qualifications. You make this setting in Customizing for Student Lifecycle Management in the IMG activity Set Up Degree Types and Assign Degree Levels.

You have defined the required academic scales and their values (grades) so that you can rate student qualifications. You make this setting in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Academic Scales → Set Up Academic Scales.

**Activities**

When you create a qualification conferment, the SAP system shows the Confer Qualification dialog box. In this dialog box, you can choose a qualification and enter the student’s qualification data.

- You can assign a grade and academic honors. When you rate a qualification, you may only enter grades which are in the “passed” range of the given academic scale. Qualification conferment for stage completion represents an exception to this rule: As this type of qualification is the result of work completed in a program stage, you can enter evaluations which represent a “failure” on the scale. The qualification is then flagged as “not achieved”.

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• In addition to the conferment date, you can enter the validity period, academic period and study duration for the qualification. The SAP system proposes the current system date as the conferment date and the valid-from date of the qualification.

• You can enter a comment and a note for the conferment.

• You need the functions for qualification conferment to map the conferring instance in the system. You must therefore assign the objects to the selected functions.

   ![Function must be assigned](https://image.pollinations.ai/prompt/In%20addition%20to%20the%20conferment%20date,%20you%20can%20enter%20the%20validity%20period%2C%20academic%20period%20and%20study%20duration%20for%20the%20qualification.%20The%20SAP%20system%20proposes%20the%20current%20system%20date%20as%20the%20conferment%20date%20and%20the%20valid-from%20date%20of%20the%20qualification.%20You%20can%20enter%20a%20comment%20and%20a%20note%20for%20the%20conferment.%20You%20need%20the%20functions%20for%20qualification%20conferment%20to%20map%20the%20conferring%20instance%20in%20the%20system.%20You%20must%20therefore%20assign%20the%20objects%20to%20the%20selected%20functions.)

   This function must be assigned the confer qualification activity (CQ01) and one or more allowed object types in Customizing for Student Lifecycle Management. When you create a conferment, you can only assign objects which belong to these object types to the functions.

• On the diploma, you can enter the student’s name and the title of his or her qualifying work in the original language and a second language.

• You can also confer a qualification conditionally. When you do this, the system handles this qualification as an open prerequisite for module booking. You can allow conditional bookings for open prerequisites. Then you can make a module booking even if the specific prerequisite is not fulfilled.

   ![Conditionally confer qualification](https://image.pollinations.ai/prompt/On%20the%20diploma%2C%20you%20can%20enter%20the%20student’s%20name%20and%20the%20title%20of%20his%20or%20her%20qualifying%20work%20in%20the%20original%20language%20and%20a%20second%20language.%20You%20can%20also%20confer%20a%20qualification%20conditionally.%20When%20you%20do%20this,%20the%20system%20handles%20this%20qualification%20as%20an%20open%20prerequisite%20for%20module%20booking.%20You%20can%20allow%20conditional%20bookings%20for%20open%20prerequisites.%20Then%20you%20can%20make%20a%20module%20booking%20even%20if%20the%20specific%20prerequisite%20is%20not%20fulfilled.)

   When you set a condition for qualification conferment manually, the system automatically sets a condition for module booking if this qualification is the prerequisite for a conditional booking. In this case, the conditional booking indicator must be set for relationship 529 between the qualification and module.

   When you finally confer the qualification, you must remove the manually set condition by changing the value to no pending prerequisite and thus enable the system to execute module booking unconditionally.

1.2.1.3 Assignment of Multiple Advisors

You can assign several advisors to a student, each with a different function. The assignment of multiple advisors is structured as follows:

**Advisor**

An advisor can be any of the following:

- Person (P)
- Position (S)
- Business partner (BP)
- External person (H)
- Senior student (ST)

Each advisor assignment can be uniquely identified by its advising function.

**Advising Function**

This describes the objective or role of the advisor assigned to the student, for example, Honors Advisor, Academic Advisor, or Athletic Advisor. One advisor can advise a student in various advising functions.

**Advising Context Type**

Each advising function has an associated advising context type. For example, the Honors Advisor will give advice on the different programs types for which the student is eligible.

**Advising Context**

Each advising context type has an associated advising context for which advising takes place. For example, the Honors Advisor will give advice on the different programs types for which the student is eligible, such as graduation and post graduation.
The Multiple Advisors function only allows you to assign one main or leading advisor to a student for a given time period. You can also set an advising function as a main function in Customizing for Student Lifecycle Management, but you must assign that function to the leading advisor.

Several advisors can be assigned to any of the different advising functions, with the exception of the main advisor function.

You can create and maintain your own advisor function, advising context type and advising context in Customizing.

You can maintain your own business checks for the advisor assignment using a Business Add-In (BAdI) that is available in Customizing.

**Activities**

You make the settings for this function in Customizing for Student Lifecycle Management, under Student Lifecycle Management → Student Lifecycle Management Master Data → Students → Multiple Advisors.

### 1.2.1.4 Maintenance of Student Master Data

**Use**

You use master data maintenance to create, display, and change student master data. You access master data maintenance from the SAP menu by choosing Student Lifecycle Management → Student Administration → Master Data.

You can also access master data maintenance from the Student File [Page 38] application. In the student file, you can maintain student master data as well as student program data.

The master data maintenance application uses the object manager [Page 26], which is a convenient user tool for student search and selection.

In the object manager [Page 26] search area, you can also search by last selected students or create your own search variant.

**Integration**

When you create the master data for a student, the system automatically creates an SAP business partner for this student. The SAP business partner is an integral element of the student object.

The system stores the student’s personal, address and study data in infotype data records. Bank and payment card information, on the other hand, is stored in the business partner master record. Student administration uses the student object in processing, whereas student financial transactions use the business partner.

**Features**

In master data maintenance, you can edit the following student master data:

- Personal data
- Standard address
- Address overview
- Program data
- Additional data
- Residence and visa data
- External academic achievements
- Fee calculation data
- Employment data
• Alumnus data
• Sponsor data
• Contract objects
• Bank data
• Challenge data
• Payment cards
• Related persons

The student master data is displayed on tab pages. The number, title, and order of tab pages in your system can differ from those mentioned above as these settings can be adjusted to individual requirements in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Students → Customizing the Master Data Maintenance Transaction.

See also:
Editing Student Master Data [Page 49]

1.2.1.4.1 Editing Student Master Data

Use
You can edit student data directly using master data maintenance or indirectly using the student file [Page 38] application. In the student file, you can maintain student master data and program data, and perform program-related activities.

When you create a student master record, the system automatically creates an SAP business partner as an integral element of the student object. In addition, the system performs a duplicate check [Page 50] for the student being created.

Prerequisites
You know which type of student number assignment your system uses when you create students. The method, format, and number range intervals for student number assignment are defined in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Students → Student Numbers and Object IDs. The system offers the following methods of student number assignment:

• Internal number assignment: The system automatically assigns a student number when you create a student.
• External number assignment: You assign the student numbers.
• Combined external and internal number assignment: The system assigns a student number if you do not enter one.

Procedure

I. Displaying Student Master Data

1. From the SAP menu, choose Student Lifecycle Management → Student Administration → Master Data → Display.
   The Display Student Master Data screen appears.
2. Choose the relevant tab page to view the student data.
II. Creating Student Master Data

1. From the SAP menu, choose \textit{Student Lifecycle Management} $\rightarrow$ \textit{Student Administration} $\rightarrow$ \textit{Master Data} $\rightarrow$ \textit{Create}.

The \textit{Create Student Master Record} screen appears.

1. If you use external number assignment (see Prerequisites), enter the \textit{student number}.
2. Enter the student data on the respective tab pages.

To undo creation of a student master record, choose \textit{Undo create}.

2. To save a student master record, choose \textit{(Save)}.

III. Maintaining Student Master Data

1. From the SAP menu, choose \textit{Student Lifecycle Management} $\rightarrow$ \textit{Student Administration} $\rightarrow$ \textit{Master Data} $\rightarrow$ \textit{Change}.

The \textit{Maintain Student Master Data} screen appears.

1. Change the student data on the respective tab pages.
2. To save changes in the student master record, choose \textit{(Save)}.

1.2.1.4.2 Duplicate Check While Creating Student Master Data

Use

The system automatically performs a duplicate check when you create a student master record. This prevents you from creating two or more master records for the same student.

Features

When performing the duplicate check, the system determines the potentially identical records based on the following subsets:

- All students with the same identification number
- All students with the same birth date, similar first names, and similar last or birth names
  - The system compares the last name you enter with existing last names. It also compares last names with existing birth names and birth names with existing last names.
  - If the birth date is not specified, the system determines the students that have the same first and last names as the student you are creating.

The selection is always based on the current system date.

The resulting set of the duplicate check contains all the students that satisfy the of the above-mentioned criteria.

Activities

If the duplicate check result is positive, the system displays a dialog box listing the students with similar attributes. You can choose from the following options:

- If one of the listed students is identical to the student you are creating, select this student and choose \textit{Copy}.
  - The system cancels creation of the new student master record, and displays the selected master record in the change mode.
- If you want to continue with master record creation, choose \textit{(Cancel)}.
1.2.1.5 Distribution of Student Master Data to Other Systems

Use

*Student Lifecycle Management* can distribute student master data to other systems. Distribution can be automatic or on-demand.

Integration

The system uses the SAP NetWeaver Exchange Infrastructure for distribution of data.

Prerequisites

You have installed, set up and configured the *SAP NetWeaver Exchange Infrastructure* for this application. You have also activated the distribution of data in the system. You can make these settings in Customizing for *Student Lifecycle Management* in the *Activate Distribution of Student Data to Other Systems* IMG activity.

Features

*Student Lifecycle Management* can distribute the following student data:

- Business partner data (addresses, bank data, payment card data)
- Personal data
- Additional data
- Residence data
- Visa data
- Study data
- Fee calculation data
- Challenge data
- Student number

Note the following differences in data changes that are planned after the current date:

- *Student Lifecycle Management* can distribute planned data changes to systems that store data time dependently in real time (that is, with the planned change date).
- *Student Lifecycle Management* can distribute planned data changes to systems that do not store data time dependently as soon as these changes become valid.

Activities

If you want *Student Lifecycle Management* to distribute data to systems that do not store data time dependently, you must schedule program BUPTDTRANSMIT in the *Student Lifecycle Management* system daily.

1.2.1.6 Data Privacy Warnings

Use

You can assign students a data privacy level and have the system display a warning when users access student data that has been classified as private. In this way you can map the regulations governing data privacy agreements between students and the university, or the confidential nature of certain student data in the system.

If data privacy regulations apply to certain data, a data privacy warning like the one below appears when a user attempts to access this data:

*Privacy Protection Agreement*

*The student has requested that his/her personal and academic data not be disclosed.*

The FERPA rules, which apply in the US, are an example of such data privacy regulations.
Prerequisites

The system displays a data privacy warning if the following conditions are fulfilled:

**Customizing**

- The dialog transaction is flagged as subject to data privacy rules.
- The required data privacy level and the associated warning are defined.

You system administrator makes these settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Students → Data Privacy Levels and Warnings.

**Student Master Data**

You have assigned the student a data privacy level and the relevant data privacy warning in student master data. Your system administrator can also set up data privacy levels without privacy warnings in the system.

**Activities**

*Assigning a Data Privacy Level in Student Master Data*

You can assign a data privacy level to a student in student master data.

1. To do this, choose the Additional Data tab page in master data maintenance [Page 48].
2. Choose the required data privacy level.

*What To Do When a Data Privacy Warning Appears*

When a dialog box with a data privacy warning appears, confirm the warning by choosing (Continue).

**1.2.1.7 Student Notes**

**Use**

You can create different types of notes for specific students or programs. Possible note types are:

- General note
- Appraisal note
- Progression note

**Integration**

The system stores the notes you create in the ST object (student) or CS object (study) of infotype 1707 (Notes). The CS object serves as a carrier object for programs (object SC). Each note type is a subtype of infotype 1707.

**Prerequisites**

The required note types are defined. Your system administrator makes this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Students → Notes → Create Note Types. The standard system does not contain any predefined note types.

**Activities**

You display and edit notes in the Student File [Page 38] by choosing (Note overview) or the Goto → Note overview.

The Note Overview screen appears. There, you can specify whether the system should display all notes or only specific notes. This setting determines which note types and notes you can process.

When you create a note, you must assign it to a student or program depending on the note type. When creating notes, take into account the following:
• If a note type can only be assigned to a student, you always create the note for a student irrespective of the program in which the student is registered.

• If a note type can only be assigned to a program and the student is registered in more than one program, you must select the program to which the note should be assigned.

• If a note type can be assigned to a student as well as a program, you must specify whether you are creating the note for a student or program.

Your system administrator defines whether a note type can be assigned to a student, a program, or to both object types in Customizing.

1.2.1.8 External Transcripts

Use

You can enter the information in the external transcripts issued to students by external organizations in student master data [Page 48].

You can acknowledge the external qualifications and external subjects recorded in external transcripts as equivalent to modules or internal qualifications.

Prerequisites

• Your system administrator has made the required settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Educational Background → External Academic Work → External Transcripts.

• You have created the external organization [Page 107] that issued or transferred the transcript.

• You have created the external subjects [Page 12] and external qualifications [Page 14] that this external organization offers.

• You have created the relationships between the external organization and the external subjects or qualifications.

Features

You can enter the following external transcript data in the system:

• Issuing or transferring external organization

• General transcript data

• External averages as grade averages or credits

• Degrees and internal qualifications awarded to the student, including the grades

• Academic sessions in which the student completed the academic work

• External subjects taken

• Coded notes

• Comments

If the required conversion factors are defined in Customizing, the system converts the external grades and credits recorded in the transcript to internal grades or credits based on the standard scale. You can manually overwrite the internal values determined by the SAP system.

Your system administrator defines the scales and associated conversion factors in Customizing for Student Lifecycle Management under Master Data → Academic Scales → Set Up Academic Scales.

You can set up a general external organization grading scale in the Scales/Credits infotype (1755) and use this scale for external subjects or external qualifications, or you can set up a
special external subject or external qualification grading scale as *additional data* in the infotype *Relationships* (1001). A special external subject or external qualification grading scale overrides the general grading scale of the external organization.

Your system administrator defines the conversion factor for credits in Customizing for *Student Lifecycle Management* under *Master Data → Credits → Set Up Credit Types*.

### Activities

You can edit a student’s external transcripts in [student master data maintenance](#) on the *Ext. Achievements* tab page.

### 1.2.1.9 External Test Results

#### Use

You can enter the data of external test results issued by external organizations in [student master data](#).

#### Prerequisites

Your system administrator has made the required settings in Customizing for *Student Lifecycle Management* under "Student Lifecycle Management Master Data → Educational Background → External Academic Work → External Test Results".

#### Features

You can enter the following external test result data in the system:

- Test type and test date
- General test data
- Test results
- If the test consists of several subtests, the subtest results

#### Activities

You can edit a student’s external test results in [student master data maintenance](#) on the *Ext. Achievements* tab page.

### 1.2.1.10 Visiting Studies

#### Use

You can map visiting students and exchange students in the system using the functions for visiting studies for incoming students and for outgoing students which are provided in the student file.

If the visiting studies are exchange studies, you can assign an [exchange program](#) to these visiting studies.

#### Integration

You can map the admission prerequisites for an exchange program in the system by assigning it an audit type and a requirement catalog.

#### Prerequisites

You can make the settings for visiting studies in Customizing for *Student Lifecycle Management* under *Student Lifecycle Management Processes → Admission, Registration, and De-registration → Visiting Studies*.

You can make the settings for exchange programs in Customizing for *Student Lifecycle Management* under *Student Lifecycle Management Master Data → Academic Structure → Exchange Programs*. 
Activities
You can assign visiting studies to a student on the Visiting Studies tab page of the Student File [Page 38].
You can create an exchange program by choosing SAP Menu → Academic Structure (Curriculum) → Exchange Program from the SAP Easy Access screen.

1.2.1.11 Cohorts

Use
Cohorts are groups of students for whom the same administrative processes apply. You can group students using the Cohort Builder.

Integration
When you assign students to a cohort in the Cohort Builder, you can use selection methods [Page 29].

Prerequisites
You have made the systems settings for cohorts in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Cohorts.

Features
You can define the administrative processes for cohorts by assigning cohort contexts to them. The SAP standard system contains the Module Booking cohort context (key 0001). This context is used to group students who attend (have booked) the same business events and for whom you can therefore plan events simultaneously.

You can assign context objects to cohorts. The system uses these context objects as additional information on how to execute the administrative processes that refer to a particular context. In the Module Booking cohort context, for example, you can assign the modules or business events that a particular group of students attends or will attend to a cohort.

You can arrange cohorts in hierarchical order. Cohorts can contain subcohorts or belong to main cohorts. All students in a subcohort always also belong to the higher-level main cohort. All context objects of a main cohort always also belong to the lower-level subcohort. You can distribute the students from a cohort to a subcohort. To do this, make the required settings in Customizing for Student Lifecycle Management, by choosing Student Lifecycle Management -> Student Lifecycle Management Processes -> Cohorts -> BAdI: Distribute Students from Cohort to Subcohorts.

You can assign cohorts to organizational units, programs, and program types. Furthermore, you can define sessions of offering and capacities for cohorts.

You can perform mass module bookings, based on cohorts.

Activities
You create and edit cohorts using the Cohort Builder which you can access from the SAP Easy Access screen by choosing SAP Menu → Student Lifecycle Management → Tools → Cohort Builder.

You can assign students to cohorts via the cohort builder or student file.

You can also edit the cohorts with a Module Booking context to a limited extent using event planning functions. In the Edit Event Offerings for Cohorts transaction, you can assign business events to cohorts as context objects and remove these again.

If you want to use cohorts in user-defined programs, you can use the methods of interfaces IF_HRPIQ00COHORTS_QUERY and IF_HRPIQ00COHORTS_CAUD in class CL_HRPIQ00COHORTS_GENERAL. The system also calls these methods from the cohort builder. You must use these methods when you edit cohorts. If you edit cohort data in any other way (for example with transaction PP01), data inconsistencies are likely to occur.
1.2.1.12 Mass De-registration

Use

You can use the mass de-registration program [Page 43] to automatically execute de-registration for students who satisfy certain conditions.

In the standard system, you can perform mass de-registration for students who do not have a sessional registration that applies up to a specific key date. You can also set up mass de-registration with user-defined selection methods for the following cases:

- Mass de-registration of students who have not paid their tuition fees by a specific key date
- Mass de-registration of students who have passed all exams in their final year of study and are thus qualified to graduate
- Mass de-registration of students whose progression results show that they have failed

Integration

The criteria you define for student selection are used as the basis for automatic de-registration. Which selection criteria the system offers and which students it selects for de-registration depend on the selection method you specify on the selection screen of the mass de-registration program. For more information, see Object Selection for Mass De-registration [Page 31].

When you execute mass de-registration, you can specify that the de-registration activity should trigger a cancellation activity for module bookings. If you specify this, the module bookings for the academic sessions after the end of program registration specified on the selection screen will be cancelled.

Prerequisites

You have implemented the required selection methods and assigned them to selection method group DER1 (mass de-registration). You make these settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → General Settings → Selection Methods.

The system can execute de-registration only if the selection method returns objects of the object type study (CS).

The standard system contains selection method DE00 (students with a study segment and without a sessional registration). This selection method selects those students of a program who do not have a sessional registration that applies up to a specific key date. You can use a selection variant to enter the parameters for this selection method. These parameters are:

- One or more programs or program types
- A specific date, or academic year and academic session

Features

When you execute a test run, the mass de-registration program simulates de-registration and displays a list of the students for which it would execute automatic de-registration based on the specified selection criteria. However, data is not changed in the test run.

If you do not set the test run flag, the system performs an update run. In an update run, the mass de-registration program performs a de-registration activity [Page 43] for the selected students.

The SAP System displays the results of mass de-registration in an output list. You can create and select your own layout variants for this output list.

Activities

You can access the mass de-registration program by choosing Student Lifecycle Management → Student Administration → Reports → Mass De-registration from the SAP menu.

To view the application logs of previous program runs, choose Display Logs on the selection screen.
1.2.1.13 Correspondence

The Correspondence section of Student Administration contains the functions you need to output notifications for activities performed in Student Lifecycle Management.

Student Lifecycle Management uses the print workbench and the correspondence functions of the Contract Accounts Receivable and Payable (FI-CA) component for processing correspondence.

1.2.1.13.1 Ad Hoc Correspondence

Use

You can create ad hoc correspondence on the Correspondence tab page of the Student File. By choosing the Generate Correspondence pushbutton, you can create (create and print) student and admission correspondence. The correspondence you have created (created and printed) is displayed in table form or in a tree structure. You can select the display category by choosing the pushbutton with the quick info Grid or Tree.

It is not possible to create ad hoc correspondence as single correspondence in the background.

Integration

When you create single correspondence using the ad hoc correspondence application, the system uses the functions of the Contract Accounts Receivable and Payable (FI-CA) component.

Prerequisites

Before you can create ad hoc correspondence in the student file, you must define an active application form (and make the other settings that are necessary for correspondence creation). You can define the application forms in Customizing for Student Lifecycle Management in the IMG activity Define Application Forms for Ad Hoc Correspondence. If you do not define an active application form, then none is offered for selection in the student file. You will therefore also not be able to print ad-hoc correspondence in the student file.

1.2.1.13.2 Outputting PDF-Based Print Forms with Adobe® Forms

Use

You can output application forms as PDF-based print forms.

Prerequisites

When you use PDF-based print forms, you must create the interface and the form separately in the Form Builder. When you have created the interface, you can assign a form to it and then specify the data you require from the interface in the form.

Example

The following application forms in the standard system are example PDF-based print forms:

- ISHERCMAC_INVOICE_SAMPLE_PDF
- ISHERCM_CORR_DUNN_SAMPLE
1.2.2 Student Accounting (IS-HER-CM-AC)

Purpose
This component enables you to:

- Calculate tuition fees, define different fee calculation periods, perform automatic calculations
- Manually correct the calculated result
- Distribute revenues to the different Controlling objects of CO account assignment
- Execute a flexible fee calculation test run at any time
- Manage and evaluate grants, exchange grant information between the SAP System and an external system Post accounting documents for students and sponsors
- Allow students to pay fees by payment card

Implementation Considerations
You make settings for student accounting in Customizing for Student Lifecycle Management under Student Accounting.

You make the student account settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Student Contract Account (Student Account).

You make the business partner settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Students → Students as Business Partners.

You make program or module fee calculation settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Academic Structure → Programs of Study or Modules → Fee Calculation Data.

Integration
Student accounting is not a standalone process. It consists of several processes which are executed at different time points. The following diagram shows the elements which make up the student account.
In the top part of this diagram, you see how student accounting is linked to other areas which contain additional information and contribute the student's overall financial situation.

In the bottom part of the diagram, you see the adjacent areas of Financial Accounting. These areas do not contain individual student data. The student's accounting data is mapped at a more global level in these areas. For example, this could be the costs cumulated for a cost center, revenues for a specific budget account, and so on.

1.2.2.1 Fee Calculation

You can use the Student Lifecycle Management fee calculation application to:

- Calculate fees for individual students, or in a mass run
- Perform a flexible fee calculation test run (at any time)
- Analyze the calculated result
- Manually correct the calculated result
- Post the calculated result and manual correction to an FI-CA document
- Edit payments
- Distribute revenues

For more information, see:

Fee Calculation [Page 59]
Manual Correction of the Fee Calculation Result [Page 67]
Fee Calculation Analysis [Page 68]
Fee Calculation Result Posting [Page 69]
Fee Calculation Testing [Page 70]

1.2.2.1.1 Fee Calculation Process

Purpose

The fee calculation process enables you to perform the following activities:

- Calculate fees in a flexible manner
- Recalculate fees at any time
- Overwrite fee calculation results

Process Flow

1. The fee calculation process is based on the following information:
   - Student data (for example: student group, fee category, organizational unit assigned to the student)
   - The parameters you defined for the fee calculation (for example: calculation base, processing mode).

2. The system checks the fee calculation object for each pricing procedure, and accesses the data required for the fee calculation.
   For more information, see Fee Calculation Date [Page 66].

3. The system checks each pricing procedure to obtain a group of condition types and their account keys. Using the condition type and fee calculation information, the system calculates the amount for the given condition record.
   For more information, see Fee Calculation Procedure [Page 60]
4. The system determines the CO account assignment rules using the account keys (derived from the condition types) and the fee calculation periods (derived from the calculation date), and distributes the revenues.

For more information, see **Distribution of Revenues [Page 61]**.

**Activities**

**Method 1:**

1. In the student file, Choose 📚. The *Fee Calculation* screen appears.
   
   You can also access fee calculation from the SAP Easy Access screen. Choose **SAP Menu → Student Lifecycle Management → Student Accounting → Fee Calculation → Fee Calculation**.

2. In the top part of the *Fee Calculation* screen, enter the following data:
   
   ○ Selection method or student number
   ○ Calculation base
   ○ Processing mode
   ○ Fee calculation date

3. In the bottom part of the *Fee Calculation* screen, specify whether you want the system to post the result directly or display it before posting.

4. Choose 📚 with the quick info text *Execute*.

**Method 2:**

Fee calculation can be triggered by an event.

Depending on the Customizing settings, changes to student master data or registration data may trigger a fee calculation run immediately or in the background.

You can see which event triggered fee calculation by choosing *Account Balance* in the *Student File* screen.

**Result**

When the system has calculated the fees for a student, you can

- Display the fee calculation result
- **Manually correct the fee calculation result [Page 67]**
- Post an **FI-CA document for the fee calculation result [Page 69]**
- Perform a **fee calculation analysis [Page 68]**
1.2.2.1.1.1 Fee Calculation Procedure

The fee calculation procedure is a hierarchical structure which is based on the relationship between the different pricing procedures. The fee calculation procedure is used to calculate fees for a certain group of students.

The following diagram shows the relationship between different pricing procedures.

1.2.2.1.1.2 Distribution of Revenues

Process Flow

1. When the system has calculated the amount for each account key, it distributes the amounts according to the CO account assignment rule assigned to each account key.

   The following diagram shows how the amounts are distributed according to the CO account assignment rules assigned to the account keys:
2. The amount is distributed according to the rule elements created by the CO account assignment rule. The following diagram shows how the amounts are distributed according to the assigned rule elements:
Check if cost distribution data is maintained for the program (infotype 1018)

Program XXX

Cost Distribution (Infotype 1018)

<table>
<thead>
<tr>
<th>CO Area</th>
<th>Cost Center</th>
<th>Order</th>
<th>WBS</th>
<th>Name</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM01</td>
<td>CC01</td>
<td></td>
<td></td>
<td>Cost Center 1</td>
<td>20</td>
</tr>
<tr>
<td>CM01</td>
<td>CC02</td>
<td></td>
<td></td>
<td>Cost Center 2</td>
<td>20</td>
</tr>
<tr>
<td>CM01</td>
<td>CC03</td>
<td></td>
<td></td>
<td>Cost Center 3</td>
<td>40</td>
</tr>
</tbody>
</table>

Yes

Is the sum of all percentages 100?

\[ \sum = 20 + 20 + 40 = 80 \]

No

Check if cost distribution data is maintained for the organizational unit (Infotype 1018)

Organizational Unit 50000001

Cost Distribution (Infotype 1018)

<table>
<thead>
<tr>
<th>Master Cost Center</th>
<th>Order</th>
<th>WBS</th>
<th>Name</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>010000128988</td>
<td></td>
<td></td>
<td>Master Cost Center f. School of Law</td>
<td></td>
</tr>
</tbody>
</table>

No

Check if other rule elements exist

Distribute all revenues to a dummy G/L account using rule element A.

Exit
Result

In this case, the amount with the account key TUI is distributed as follows:

<table>
<thead>
<tr>
<th>Total</th>
<th>1,000 EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Center CC01</td>
<td>200 EUR</td>
</tr>
<tr>
<td>Cost Center CC02</td>
<td>200 EUR</td>
</tr>
<tr>
<td>Cost Center CC03</td>
<td>400 EUR</td>
</tr>
<tr>
<td>Cost Center 0100000128988</td>
<td>200 EUR</td>
</tr>
</tbody>
</table>

Prerequisites

Revenues are distributed during fee calculation. If you want the system to distribute amounts automatically, you have to:

- Maintain cost distribution data (infotype 1018) [Page 64]
- Define CO account assignment rules [Page 64]

1.2.2.1.1.2.1 Cost Distribution Data (Infotype 1018)

If you wish to distribute the revenues to more than one CO object (cost centers, orders, WBS elements), you have to create cost distribution data (infotype 1018). Enter the percentage of revenues you wish to assign to the different CO objects by creating infotype 1018 data records for the following objects:

- Programs of study
  From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Program of Study.
- Modules
  From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module.
- Organizational units
  From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Environment → Organizational Management → Organizational Plan → Organization and Staffing → Change.
- You also have to create the CO account assignment data for the top organizational unit.
  - You can find the data for top organizational unit in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Academic Structure → Organizational Structure → Define Top Organizational Unit.
  - To create the CO account assignment data for the top organizational unit, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Environment → Organizational Management → Organizational Plan → Organization and Staffing → Change.

You must create infotype 1018 records and CO account assignment data for the top organizational unit in order for the system to generate the CO objects (using distribution methods).

1.2.2.1.1.2.2 Rules for CO Account Assignment

Each CO account assignment rule (CO rule) contains one or more CO account assignment rule elements.

Distribution Methods in the SAP Standard System

The SAP standard system offers four distribution methods (= CO rule elements). The system provides the following methods for distribution of revenues. These are processed by separate function modules:
Method A:
No CO assignment, and therefore no distribution of revenues. 
All revenues are posted to one G/L account.
Function module: CMAC_ACC_DERIVE_NONE

Method B:
The system distributes the revenues to the CO objects assigned to the university’s top organizational unit.
Function module: CMAC_ACC_DERIVE_TOP_ORG

Method C:
The system distributes the revenues to the CO objects assigned to the programs of study or modules.
Function module: CMAC_ACC_DERIVE_ORG

Method D:
The system distributes the revenues to the CO objects assigned to a specific organizational unit of the university.
Function module: CMAC_ACC_DERIVE_FIXED_ORG

User-Defined Distribution Methods
You can create your own distribution methods, and assign function modules to them. You create methods in Customizing for Student Lifecycle Management by choosing Student Accounting → Fees → Pricing → Integration with Controlling: CO Account Assignments → Define CO Rule Elements and Assign Function Modules.

The function modules you create must have the same interface as the function modules provided in the SAP System. 
The function modules retrieve the required data from SI_KOMK/P_CM, and create an output table or output NOT_FOUND. They need to buffer both kinds of result.

Automatic Distribution Rules
You can maintain the distribution rules by combining rule elements in a specific sequence. You make this setting in Customizing for Student Lifecycle Management by choosing Student Accounting → Fees → Pricing → Integration with Controlling: CO Account Assignments → Define CO Rules for CO Account Assignment.

You can define CO account assignment rules, as follows:

Rule 001:
First, distribute revenues using method C.
Then distribute revenues using method B.

Rule 002:
Distribute revenues using method B.

Rule 003:
Distribute revenues using method D.

If the system finds no CO objects after it has applied all methods in the rule, it uses method A and posts all revenues to a dummy G/L account.
If not all of the revenues are distributed using the CO account assignment rules, the remaining revenues are distributed to the main cost center of the respective organizational unit.
Different types of fees are distributed to different CO objects (cost centers, orders, WBS elements) according to your Student Lifecycle Management Customizing settings.

- The revenues that have the account key TUI (tuition fees) should be distributed according to CO rule 001.
- The revenues that have the account key HOU (housing) should be distributed according to CO rule 002.
- The revenues that have the account key SPT (sports fees) should be distributed according to CO rule 003.

### 1.2.2.1.1.3 Fee Calculation Date

The system derives the fee calculation period from the fee calculation date. You can use the fee calculation date to calculate the fees which are due in different periods.

The following diagram shows the connection between the fee calculation date, fee calculation period, and academic session.

#### Fee Calculation Period

<table>
<thead>
<tr>
<th>Acad.Year</th>
<th>Session</th>
<th>FeeCalcPeriod</th>
<th>Open from</th>
<th>Open to</th>
<th>Previous Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001/2002</td>
<td>Session 1</td>
<td>2Q01</td>
<td>03.01.2001</td>
<td>02.28.2002</td>
<td>2000</td>
</tr>
<tr>
<td>2001/2002</td>
<td>Session 2</td>
<td>2Q01</td>
<td>03.01.2001</td>
<td>02.28.2002</td>
<td>2000</td>
</tr>
</tbody>
</table>

#### Academic Calendar

<table>
<thead>
<tr>
<th>Acad. Year: 2000/2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Limit</td>
</tr>
<tr>
<td>0100</td>
</tr>
<tr>
<td>0100</td>
</tr>
</tbody>
</table>

#### Key Date Category

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Key Date Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Start of session</td>
</tr>
<tr>
<td>Program</td>
<td>End of session</td>
</tr>
<tr>
<td>Module</td>
<td>End of session</td>
</tr>
</tbody>
</table>

If the system were to calculate fees for students on 10.24.2001, it would access the following data:

- Student data as from 09.28.2001.
- Program data from 06.05.2002.
- Module data from 06.05.2002.
1.2.2.1.2 Manual Correction of the Fee Calculation Result

Use

When the system has calculated the fees, you can make the required manual corrections.

Manual corrections can only be made for individual calculations and only before they are posted. Manual corrections cannot be made for mass fee calculation runs.

Procedure

To make manual corrections after an individual calculation, proceed as follows:

1. You have run fee calculation for an individual student and are on Overview of Period Key [period key identifier] screen.
2. In the New Correction field, enter the revised amount. When you confirm your entry, the system displays the result of the fee calculation and the previous and new manual correction in the Total Amount field.
3. Enter an explanatory text for the new manual correction.
4. Choose in the Cost Distribution column to display the distribution. You also can change the distribution manually.
5. To post the fee calculation result and the manual correction, choose with the quick info text Post.

Example

The following diagram shows the consequences of two manual corrections for the same account key.

- You can make several manual corrections. The total of your corrections is displayed in the Prev Crrt field. The Total Amount field contains the sum of the fee calculation result and the previous and new manual corrections.
- After you have made the manual correction, the system distributes the amount automatically. You also can change the distribution manually.
1.2.2.1.3 Fee Calculation Analysis

Use

When the system has calculated the fees, you can analyze the fee calculation result. To do so, choose Fee Analysis on the Overview for Period Key [period key identifier] screen.

The Fee Calculation Analysis for Period Key [period key identifier] screen which then appears contains the following information:

- Detailed information on the structure of the fee calculation procedure
- Detailed information on each student, and the associated program and modules
- Detailed information on each condition type and condition record

You can perform the fee calculation analysis for individual calculations as well as for mass runs.

Example

The following diagram show the structure of the Fee Calculation Analysis for Period Key 0001 screen.

**Fee Calculation Analysis for Period Key 0001**

Tom Lee

<table>
<thead>
<tr>
<th>Steps and Periods</th>
<th>Calc. Rule</th>
<th>Calc. Object</th>
<th>Crcy</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>S0</td>
<td>Max.</td>
<td></td>
<td>UNI</td>
<td>2,150.00</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td></td>
<td>UNI</td>
<td>2,150.00</td>
</tr>
<tr>
<td>S1</td>
<td>Program</td>
<td></td>
<td>UNI</td>
<td>2,000.00</td>
</tr>
<tr>
<td></td>
<td>Module</td>
<td></td>
<td>UNI</td>
<td>150.00</td>
</tr>
<tr>
<td>S2</td>
<td>Total</td>
<td></td>
<td>UNI</td>
<td>2,000.00</td>
</tr>
<tr>
<td></td>
<td>Program</td>
<td></td>
<td>UNI</td>
<td>2,000.00</td>
</tr>
</tbody>
</table>

The fee calculation analysis screen is divided into three parts:

- In the top left-hand part of the screen, you see the different steps of the fee calculation procedure.
- In the top right-hand part of the screen, you see the fee calculation results of each step you selected.
- In the bottom part of the screen, you see further information on the student, program of study, and modules.

○ To display the lower part of the screen, choose with the quick info text Display Student Info, or double-click a line with the icon 📊.

○ In the lower part of the screen, double-click an entry to switch to the Item – Conditions screen.

This screen offers the following processing options:
Choose with the quick info text *Condition Details* to display detailed information on the condition type, condition value, control data, and account determination. You can also check the condition record for this condition type.

Choose *Analysis* to access the *Condition Analysis* screen. This screen informs you which condition types and condition records were used to calculate fees for the student.

Choose *Condition Record* to display the condition supplements for each condition type.

### 1.2.2.1.4 Fee Calculation Result Posting

**Use**

When the system has calculated the fees for a student, you can post two types of documents:

- A statistical document
- A real document.

If you choose the *calculation base admission application data*, the system posts a real document for the fee calculation result.

If you choose the *calculation base study data*, the type of posting document depends on the *processing mode* you select.

**Prerequisites**

You have made the required settings for fee calculation documents and FI-CA documents. You make these settings in Customizing for *Student Lifecycle Management under Student Accounting* → *Fees* → *Posting* → *Fee Calculation Documents and FI-CA Documents*.

**Features**

You can post the fee calculation result right after fee calculation, or you can display the result first before posting it. Choose the posting option you wish to use on the fee calculation screen.

The system displays the document number in the application log.

### 1.2.2.1.5 Payment Card

**Purpose**

The use of payment cards offers the following advantages:

- Students can pay for goods and services with their payment card
- The university can
  - Obtain authorizations from external systems
  - Import data from external systems into the SAP System.

**Prerequisites**

You have made the system settings for payment cards in Customizing for *Cross-Application Components* under *Payment Cards* and in Customizing for *Student Lifecycle Management under Student Accounting* → *Payment Card*.

You have entered the bank details and payment card data for each student. You make these settings in student master data maintenance on the *Payment Transactions* tab page.
Process Flow

The following diagram shows how payments are processed when a payment card is used.

1. When the system has calculated the fees, it posts an accounting document for the student.
2. The student (card holder) pays the fees using a payment card.
3. The payment card number together with the cardholder’s name and address are forwarded to the clearing house for authorization.
4. The clearing house checks this information and either authorizes the transaction or rejects it. If the clearing house authorizes the transaction, a transaction number is created.
5. After the clearing house has authorized the transaction, the university posts the receivables to a special cash clearing account for the clearing house.
6. The payment method the system uses depends on the type of payment card used.

Result

When a student pays his/her fees using a payment card and the clearing house authorizes the transaction, the system posts the receivables to a special cash clearing account for clearing, and uses the payment transaction which is specified for the payment card type used.

1.2.2.1.6 Running the Fee Calculation Test Program

Use

When you have made the fee calculation settings in Customizing for Student Lifecycle Management, you can run a fee calculation test program. This program enables you to check if your system settings are complete and correct.

Procedure

1. Enter the test data in Customizing for Student Lifecycle Management by choosing Student Accounting → Fees → Pricing → Fee Calculation Test Tool → Generate Test Data.
2. Start the test program in Customizing for Student Lifecycle Management by choosing Student Accounting → Fees → Pricing → Fee Calculation Test Tool → Run Test Program for Fee Calculation.
Result

- You can display the fee calculation result.
- You can analyze the fee calculation result.

⚠️ When you run the fee calculation test program, you will not be able to post the results as these are only test data.

1.2.2.2 Grants Management

Students who are eligible to receive financial support can be awarded grants. The sponsor is created as an SAP business partner. Sponsors are invoiced via their contract account. The university receives the grant and then disburses the amount to the student. You define the rules and prerequisites which the sponsor has attached to a grant in the grant details.

The system provides two methods of grant management:

- Grant Management with Student Lifecycle Management [Page 72]
- Grant Management with an External System [Page 72]

1.2.2.2.1 Creating Sponsors

The sponsor is a business partner with the role contract partner.

Prerequisites

Before you create sponsors, you must make the following system settings for business partners and contract accounts:

- Define a business partner type for sponsors.
  You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Business Partner Types → Define Business Partner Types.

- Define a business partner grouping for sponsors.
  You make this setting in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Master Data → Students → Students as Business Partners → Basic Business Partner Settings → SAP Business Partner → Business Partner → Basic Settings → Number Ranges and Groupings → Define Groupings and Assign Number Ranges.

- Define a contract account category for sponsors.

- Define the relationship between the sponsor and contract account.

- Define the standard relationship between the sponsor and contract account.
  You make this setting in Customizing for Student Lifecycle Management by choosing Student Accounting → Grants → Basic Settings → Define Standard Relationship Between Sponsors and Contract Accounts.
Procedure

1. Create a sponsor with the role contract partner.
   From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Student Accounting → Contract Accounts Receivable and Payable → Master Data → Business Partners → Create Contract Partner.

2. Create a contract account for the sponsor.
   From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Student Accounting → Contract Accounts Receivable and Payable → Master Data → Contract Account → Create.

1.2.2.2.2 Grant Management with an External System

If you use an external system and not Student Lifecycle Management to calculate grants, you can transfer the grant data from this system to Student Lifecycle Management.

Prerequisites

You have made the required system settings in Customizing for Student Lifecycle Management under Student Accounting → Grants.

Activities

1. Create sponsors in the system.
   For more information, see Creating Sponsors [Page 71].

2. Enter the grant master data in Student Lifecycle Management.
   From the SAP Easy Access screen, choose SAP Menu → Student Accounting → Grants → Edit Grant Master Data.

3. Enter the grant data for the student on the Grant Assignment tab page in master data maintenance.

1.2.2.2.3 Grant Management with Student Lifecycle Management

Purpose

You can manage student grants with the Student Lifecycle Management system. These are internally managed grants.

For internally managed grants, Student Lifecycle Management needs the following information:

- Amount granted to the student
- Conditions linked to the amount
- Disbursement types linked to the amount

Prerequisites

You have made the required system settings in Customizing for Student Lifecycle Management in the section Student Accounting → Grants.

Process Flow

4. Create sponsors in the system.
   For more information, see Creating Sponsors [Page 71].

5. Create the grant master data.
   From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Grants → Edit Grant Master Data.

6. Enter the grant data for the student on the Grant Assignment tab page in master data maintenance.
   Also enter the details for internally managed grants.
7. Perform grant evaluation.
   From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Grants → Grant Evaluation.
   - Use the evaluation mode **Expected Grant** to calculate the grant the student can expect to receive.
   - Use the evaluation mode **Disbursement Authorization** to calculate the grant which will actually be disbursed to the student.

Result
When you run grant evaluation, the system creates separate documents (grant documents) in which it saves the results for each grant and student. Then it posts the document as follows:
- In the **Expected Grant** evaluation mode, the system posts a statistical document.
- In the **Disbursement Authorization** evaluation mode, the system posts a real FI-CA document.

1.2.2.2.4 Grant Repayment
You can enter the information needed for repayment of grants in grant master data.
1. From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Student Accounting → Grants → Edit Grant Master Data.
2. Select a grant, and choose with the quick info text Details.
3. Enter the repayment information in the Repayment group box.

1.2.3 Academic Structure (Curriculum)
Curriculum planning begins with the setup of programs, and the associated structures and rules. The way in which a program is organized usually depends on the program regulations that apply. The program regulations define the following attributes of a program:
- Type and number of subjects to be completed
- Associated teaching events
- Prerequisites for attendance at teaching events and examinations

The structure of programs is usually quite diverse and bound by set validity periods.
The functions in the Academic Structure (Curriculum) section enable you to map and manage your university’s academic offerings and teaching events. Student Lifecycle Management offers the following objects for curriculum mapping:
- Program
- Module group
- Module

You can maintain and manage the programs offered by your university in the program catalog [Page 74].
You can manage program dates and deadlines in the academic calendars [Page 9]. You can map and manage the program rules [Page 111] using rule containers [Page 116].

See also:
Planning of Academic Offerings [Page 133]

1.2.3.1 Top Organizational Unit

Definition
Organizational unit [Page 17] of the university defined as the top organizational unit of Student Lifecycle Management. You must define a top organizational unit in the Student Lifecycle Management system.
Use

The SAP System requires the top organizational unit for the following functions and processes of Student Lifecycle Management:

- The SAP System always reads the dates and periods specified in the academic calendar of the top organizational unit when you do not specify a concrete query object (program, module, or organizational unit). You therefore have to create an academic calendar for the top organizational unit. In this academic calendar, you must enter the dates for time limit 0100 (standard duration of academic session) for all relevant academic sessions. (If you have configured the Student Lifecycle Management system accordingly, you can use a user-defined time limit whose function corresponds to that of the standard time limit 0100.)

- The SAP System uses the company code of the top organizational unit in the following processes:
  - When creating the student account to be used in Student Accounting
    The SAP System automatically creates a student account (contract account) when you create a student if you have made the required setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Students → Students as Business Partners → (De)Activate Automatic Student Account Creation.
  - For all postings made in Student Accounting
    Student Lifecycle Management supports only one company code per client. Student Accounting always uses the company code of the top organizational unit even if you have assigned a different company code to the lower-level organizational units.

Activities

You define the top organizational unit in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Organizational Structure → Define Top Organizational Unit.

Before you can define the top organizational unit, you must map your university’s organizational plan in the SAP System using the Organizational Management component.

In most cases, you will define the root organizational unit of your organizational structure as the top organizational unit. However, you do not have to.

Create an academic calendar for the top organizational unit and enter the dates for time limit 0100 (or for a user-defined time limit whose function corresponds to that of time limit 0100). For more information, see Academic Calendar [Page 9].

If you use Student Accounting in your system, assign the appropriate company code to your top organizational unit. To do so, choose Student Lifecycle Management → Environment → Organizational Management → Organizational Plan → Organization and Staffing → Change from the SAP menu. On the Organization and Staffing: Change screen, choose the organizational unit defined as the top organizational unit and enter the appropriate company code on the Account Assignment tab page.

1.2.3.2 Program Catalog

Definition

Application that enables you to create and administer the programs [Page 19] offered by your university.

Use

In the program catalog, you can create, structure, and manage the programs offered by a university. Special symbols indicate which modules are mandatory items or core subjects of a program. The program catalog uses the object manager [Page 26], which is a convenient user tool for object search and selection.
Structure

The program catalog contains all the programs (object type SC) offered by an organizational unit [Page 17] (object type O). The programs in the program catalog are described by the module groups [Page 88] (object type CG), modules [Page 87] (object type SM), and business event types [Page 25] (object type D) assigned to them.

See also:
Maintaining the Program Catalog [Page 75]

1.2.3.2.1 Editing the Program Catalog

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Program Catalog.

   The Program Catalog screen appears. The program catalog uses the object manager [Page 26], which is a convenient user tool for object search and selection.

2. Using the object manager, choose the organizational unit for which you want to edit programs.

3. Check the key date using (Change Key Date), and change it if necessary.

   You can specify a user-specific key date. If you do not specify a user-specific key date, the system uses the current date as the key date.

The table below lists the processing options available to you.

<table>
<thead>
<tr>
<th>Function</th>
<th>Pushbutton</th>
<th>What You Should Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an organizational unit, a program, or a module group at the same level</td>
<td>![Same Level]</td>
<td></td>
</tr>
<tr>
<td>Create an organizational unit, a program or a module group at the next lower level</td>
<td>![Create One Level Lower]</td>
<td></td>
</tr>
<tr>
<td>Create a program or module group using a template</td>
<td>![Create with Template]</td>
<td>Select the object you want to use as a template before choosing the pushbutton.</td>
</tr>
<tr>
<td>Create a relationship to an organizational unit, a program, module group, or module</td>
<td>![Create Relationship]</td>
<td></td>
</tr>
<tr>
<td>Delete the relationship to an organizational unit, a program, module group, or module</td>
<td>![Delete Relationship]</td>
<td></td>
</tr>
<tr>
<td>Change the data of an organizational unit, a program, or a module group</td>
<td>![Change]</td>
<td>Select the object before choosing the pushbutton.</td>
</tr>
<tr>
<td>Display object</td>
<td>![Display]</td>
<td>Select the object before choosing the pushbutton.</td>
</tr>
<tr>
<td>Delete an organizational unit, a program, or a module group</td>
<td>![Delete]</td>
<td>Select the object before choosing the pushbutton.</td>
</tr>
</tbody>
</table>
### 1.2.3.3 Module Catalog

#### Definition

Application that enables you to create and manage the modules [Page 87] and academic events offered by a university.

#### Use

The module catalog is an important editing interface in Student Lifecycle Management which enables you to create and manage the modules (and module groups [Page 88]) offered by a university or its lower-level organizational units (e.g. faculties) independent of the programs. In the module catalog, you can also create and maintain business event offerings [Page 82] and individual work [Page 106] for specific modules.

You can combine the modules on offer to module groups, and group their learning content.

In the module catalog, you can also assign the following objects to a module:

- The prerequisite internal qualifications [Page 15] (object type CQ) or modules by means of relationship 529 (is prerequisite of)
- The internal qualification awarded upon completion of the module
- The rule container [Page 116] (object type RC) used in checks
- The module which must be taken together with this module by means of relationship 533 (is corequisite of)
You can display the processing options for an object by clicking the selected object with the right mouse button.

**Structure**

The module catalog shows the module groups (object type CG) and modules (object type SM) offered by the university and its lower-level organizational units (object type O). If one or more business event types [Page 25] (object type D) are assigned to a module, these are also displayed.

**See also:**
- Maintaining Organizational Units in the Module Catalog [Page 77]
- Maintaining Module Groups in the Module Catalog [Page 78]
- Maintaining Modules in the Module Catalog [Page 78]
- Maintaining Business Event Types in the Module Catalog [Page 80]
- Business Event Offering of a Module [Page 82]

**1.2.3.3.1 Maintaining Organizational Units in the Module Catalog**

**Procedure**

1. From the SAP menu, choose **Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Catalog**.
   The **Module Catalog** screen appears. The module catalog uses the **object manager [Page 26]**, which is a convenient user tool for object search and selection.
2. Select an organizational unit using the object manager.
3. Check the key date using (Change key date), and change it if necessary.

   You can enter a user-specific key date. If you do not enter a user-specific key date, the system uses the current date as the key date.

The processing options for organizational units (icon - object type O) are described in the following table.

<table>
<thead>
<tr>
<th>Function</th>
<th>Pushbutton</th>
<th>What you need to know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create organizational unit one level lower</td>
<td>(Create one level lower)</td>
<td>Creates a new module group or module one level lower than the organizational unit (A501: Offers).</td>
</tr>
<tr>
<td>Create organizational unit at same level</td>
<td>Same level</td>
<td>Creates a new module group or module, and links it to the organizational unit (A501: Offers). Note: This function cannot be used for the top organizational unit.</td>
</tr>
<tr>
<td>Link organizational unit</td>
<td>(Create relationship)</td>
<td>Creates a relationship between an existing module group or module and an organizational unit (A501: Offers).</td>
</tr>
<tr>
<td>Change organizational unit data</td>
<td>(Change)</td>
<td>Select the organizational unit you want to change.</td>
</tr>
</tbody>
</table>
1.2.3.3.2 Maintaining a Module Group in the Module Catalog

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Catalog.
   The Module Catalog screen appears. The module catalog uses the object manager [Page 26], which is a convenient user tool for object search and selection.

2. Select a module group [Page 86] using the object manager.

3. Check the key date using (Change key date), and change it if necessary.
   You can enter a user-specific key date. If you do not enter a user-specific key date, the system uses the current date as the key date.

   The processing options for module groups ( icon - object type CG) are described in the following table.

<table>
<thead>
<tr>
<th>Function</th>
<th>Pushbutton</th>
<th>What you need to know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create module group one level lower</td>
<td>(Create one level lower)</td>
<td>Creates a new module group which is linked to the organizational unit (A501: Offers).</td>
</tr>
<tr>
<td>Create module group at same level</td>
<td>Same level</td>
<td>Creates a new module group which is linked to the module group (A501: Offers).</td>
</tr>
<tr>
<td>Copy module group</td>
<td>(Create with template)</td>
<td>The selected module group is used as a template for the new module group.</td>
</tr>
<tr>
<td>Delimit module group</td>
<td>(Delimit)</td>
<td>Delimits the validity period of the module group.</td>
</tr>
<tr>
<td>Delete relationship</td>
<td>(Delete relationship)</td>
<td>Deletes the relationship (A501: Offers) between the organizational unit and the module group.</td>
</tr>
<tr>
<td>Change module group data</td>
<td>(Change)</td>
<td>Select the module group you want to change.</td>
</tr>
</tbody>
</table>

1.2.3.3.3 Maintaining a Module in the Module Catalog

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Catalog.
   The Module Catalog screen appears. The module catalog uses the object manager [Page 26], which is a convenient user tool for object search and selection.

2. Select a module [Page 87] using the object manager.

3. Check the key date using (Change key date), and change it if necessary.
   You can enter a user-specific key date. If you do not enter a user-specific key date, the system uses the current date as the key date.

   The processing options for modules ( icon - object type SM) are described in the following table.
<table>
<thead>
<tr>
<th>Function</th>
<th>Pushbutton</th>
<th>What you need to know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create object one level lower</td>
<td>![Create one level lower]</td>
<td>Creates the following new objects at the next lower level, and links them with the module:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Internal qualification (A528: Imparts)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Internal qualification (A529: Needs prerequisite)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Business event type (A507: Consists of)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Rule container (B509: Uses)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Module (A529: Needs prerequisite)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Module (A533: Is corequisite of)</td>
</tr>
<tr>
<td>Create object at same level</td>
<td>![Same level]</td>
<td>Creates a module group or module at the module level.</td>
</tr>
<tr>
<td>Copy module</td>
<td>![Create with template]</td>
<td>The selected module is used as a template for the new module.</td>
</tr>
<tr>
<td>Create relationship between module and objects</td>
<td>![Create relationship]</td>
<td>Creates a relationship between the module and the following existing objects:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Internal qualification (A528: Imparts)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Internal qualification (A529: Needs prerequisite)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Business event type (A507: Consists of)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Rule container (B509: Uses)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Module (A529: Needs prerequisite)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Module (A533: Is corequisite of)</td>
</tr>
<tr>
<td>Delimit module</td>
<td>![Delimit]</td>
<td>Delimits the validity period of the module.</td>
</tr>
</tbody>
</table>
**1.2.3.3.4 Maintaining Business Event Types**

**Use**

You require business event types [Page 25] (object type D) to create and maintain business events and academic units w/o dates. Business event types are elements of a module such as lectures, Internet courses, tutorials, labs, or homework.

The delivery mode of the business event type determines whether you use a business event or an academic unit w/o dates for this business event type. Unlike business events, academic units w/o dates do not require a schedule or resources such as rooms and instructors. The category assigned to the business event type determines whether or not you can create individual work.

Business event types contain planning information such as capacity, resource types, or a schedule model. When you create a business event for the business event type, the system proposes this planning information as default values. The schedule model is not mandatory because you can override the schedule data of the business event type when you create a business event. However, you must enter the capacity and the relationships to the resource types for the business event type.

**Prerequisites**

The resource types and the resources you require for the business event type are defined. Your system administrator makes the required settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Integration of Training and Event Management → Training and Event Management → Business Event Preparation → Resource Management. In Customizing, resource types such as room and instructor are assigned specific resources. Note that resource types can be location-dependent and mandatory.

The categories, delivery modes, and teaching methods you need to maintain business event types are defined. You may also need the contact hours unit. Your system administrator makes the required settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Business Event Types. The values have the following meaning:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete reference</td>
<td>Deletes the relationship between the module and the module to which it refers (A511: Refers to).</td>
</tr>
<tr>
<td>Change module data</td>
<td>Select the module you want to change.</td>
</tr>
<tr>
<td>Maintain business event offering</td>
<td>Enables you to maintain the business event [Page 82] (business event packages, business events) of modules.</td>
</tr>
<tr>
<td>Maintain individual work</td>
<td>Enables you to maintain individual work data for modules which are assigned a category designated as individual work [Page 106]. You assign the category in the Module Data infotype (1746).</td>
</tr>
</tbody>
</table>

*© 2008 SAP AG 80*
• **Category**
  The category determines the form in which a business event is presented (lecture, tutorial, lab, etc.). The category also defines whether or not you can create individual work [Page 106] for this business event type.

• **Teaching method**
  The teaching method describes the way in which the content of a module or business event type is offered (classroom instruction, distance study, etc.).

• **Delivery mode**
  The delivery mode determines how the content of an academic event is presented to students (in a lecture, as a tutorial, in an e-learning session, etc.). The delivery mode also determines whether you have to create a business event or an academic unit w/o dates for the offering.

• **Unit for contact hours**
  You can define the expected duration of an academic offering by specifying the contact hours and unit for contact hours.

**Procedure**

1. From the SAP menu, choose **Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Catalog**.
   The Module Catalog screen appears. The module catalog uses the object manager [Page 26], which is a convenient user tool for object search and selection.
2. Choose the module for which you want to create or maintain a business event type.
   To create a business event type, proceed as follows:
   a. Select the desired module, and choose (Create one level lower).
   b. Choose relationship 507 (consists of) with the object type D (business event type).
   c. Enter an abbreviation and a name for the business event type.
   d. On the Category tab page, enter the category, teaching method, and delivery mode.

   **Category**: The category you enter determines whether the student is required to submit individual work.

   **Delivery mode**: The delivery mode determines whether you can create academic units w/o dates or scheduled business events for the business event type.

   e. Choose the tab page Relationships, and create one or more relationships to the resource types.
   f. To create a relationship, choose in the Requires resource type line.
   g. If the resource type contains no capacity data, you must enter this data manually.
   h. To enter capacity data, choose the Capacity tab page and enter the minimum, optimum and maximum capacity.
   i. Enter the required data.
   j. Choose (Save).

**Further Hints**

You can also create and maintain business event types when you maintain the business event offering [Page 82]. On the Create Business Event Offering or Edit Business Event Offering screen, choose

- **Goto → Create bus. event type or Change bus. event type**
  or the

- **Academic events tab page. Set the indicator Bus. event types, and choose Bus. event type.**
Result

When you have assigned a business event type to a module, you can create and maintain a business event offering for the module.

1.2.3.3.5 Event Offerings of a Module in the Module Catalog

Use

You can create and edit the event offerings of a module in the Module Catalog as well as in the transactions specially designed for editing event offerings (transaction code PIQACADOFFER00) and for editing event offerings for cohorts (transaction code PIQACADOFFER01). Bear in mind that not all functions are available in the business event editing interface of the module catalog. For example, in the module catalog you cannot edit the schedule description. Furthermore, the module catalog does not offer a list display or mass processing functions. However, you must use the module catalog (expert view) when you assign business events to event packages or edit sessions of offering.

A business event offering consists of the following objects:

- **Business event type [Page 25]** (object type D)
- **Business event [Page 22]** (object type E)
  - Business event with regular schedule (with and without exceptions)
  - Business event with irregular schedule
- **Time-independent event [Page 21]** (object type EL)
  
  This object type includes the business events that have not yet been scheduled. When you schedule a business event without a schedule, the system changes the object type from EL to E.
- **Event package [Page 23]** (object type SE), consisting of business events and/or time-independent events

Business events and time-independent events are created from business event types. The delivery mode of the business event type (object type D) determines whether the business event type is a business event or time-independent event.

An event offering can consist of individual business events and/or time-independent events, as well as event packages.

You can build event packages from business events and/or time-independent events. They represent the academic events offered within a module. Event packages allow students to book all academic events of a module at once instead of having to book each event individually, and thus offer considerable advantages. You combine business events and time-independent events to event packages for the following reasons:

- You can group business events that are held at the same campus and/or have the same instructor. For example, you can combine a lecture and a tutorial to an event package if they are held at the same campus by the same instructor. (They do not have to be held in the same room.) In this way, students can be forced to take the lecture and tutorial together.
- Event packages enable you to charge different fees for the same academic event.
- You can also use event packages to offer certain academic events only to specific groups of students. To do this, you must assign a rule container [Page 116] to the event package.

On the other hand, if an event offering consists of individual academic events instead of event packages, students are free to choose the business events and time-independent events within a business event type.
Prerequisites

- You have assigned business event types [Page 80] to the module. The business event type is the blueprint for the academic event.
- The campuses and resources you require are defined. Your system administrator makes these settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Academic Structure → Integration of Training and Event Management → Training and Event Management → Business Event Preparation → Resource Management.
- The holiday and factory calendar is configured. Your system administrator makes these settings in Customizing for Student Lifecycle Management under Basic Settings → Control Days Off. You can assign the configured calendars to a campus and/or to an academic calendar. For the academic calendar, you can use time limit 0200 (class period).

Integration

The SAP system saves your settings and recalls them the next time you access this editing interface in the module catalog. You can also enter these settings in your user profile as described below.

There, you can also define the validity period of an event package (for the session, to the end date of the module).

Maintenance of User Parameters
(System → User Profile → Own Data, Parameters tab page)

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CM_SHOW_PACKAGE</td>
<td>[SPACE] = Single business events X = Event packages</td>
</tr>
<tr>
<td>CM_VALIDITY_OF_EPACK</td>
<td>L = To end date of module S = For session [SPACE] = Selectable</td>
</tr>
</tbody>
</table>

Activities

If you want to create or edit an event offering in the module catalog, select a module in the editing interface and choose

- the menu option Environment → Edit Event Offering, or
- the pushbutton 🔄, or
- the context menu option Edit Event Offering (right mouse click on the module), or
- the shortcut CTRL+F1.
Activities for Maintenance of Event Offerings

<table>
<thead>
<tr>
<th>Activity</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change single date</td>
<td>On the 📅 Business Events tab page, choose the pushbutton (calendar). Select a date from the calendar, and change it as required.</td>
</tr>
<tr>
<td>Change resources for a single date</td>
<td>Choose the 📅 Business Events tab page, and then choose Goto → Resource Planning.</td>
</tr>
<tr>
<td>Display partially reserved resources</td>
<td>Choose the 📅 Business Events or 📅 Business Events tab page, and then Goto → Resource Planning. Select a resource, and then choose the pushbutton 📏 Select resources.</td>
</tr>
<tr>
<td>Display available resources</td>
<td>On the 📅 Business Events tab page, choose the pushbutton 📏 Display Avail. Resources for Schedule.</td>
</tr>
</tbody>
</table>

1.2.3.3.6 Copying Event Offerings

You can use the function for copying event offerings to create academic events for a specific academic period. This function simplifies your event planning tasks.

You can create academic events using event offering templates, or copy existing event offerings from previous academic periods.

Event offering templates serve as a blueprint for event offerings. When you create academic events, you use this blueprint and the processing type Create Business Events from Business Event Templates as a basis. You can also change the business events you have created and adjust them to the specific requirements of the academic period.

Event planning can also be based on business events from previous academic periods and on the processing type Copy Business Events.

Integration

The system automatically creates the business events you define using this program as business events with the schedule category Regular Schedule. Business events of this type have a schedule and resource description (schedule elements), which you can edit in the event offering editing transaction (transaction code PIQACADOFFER00).

1.2.3.3.6.1 Copying Event Offerings

Use

You can use this procedure to copy event offering templates or the event offerings that exist in a specific academic period to a new academic period.

Prerequisites

Before you can copy an event offering, you need to have event offering templates or event offerings in a previous academic period.
Procedure

We recommend you execute a test run before each update run. Bear in mind that this report requires considerable system resources. We therefore recommend that you schedule a background job for the update run, and copy only small units of data (for example, one organizational unit at a time).

From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Event Planning → Create Event Offering from Template. The Create Academic Events screen appears.

To copy event offering templates, proceed as follows:

1. Choose a selection method [Page 29] and selection variant. The system uses the selection method to find modules. Then it determines the event templates for the modules.
2. Choose the processing type Create Business Events from Event Templates.
3. If you want the system to check if it already used event templates to create business events, set the indicator “Check If Already Copied”.
4. Specify if you want to copy planned or firmly booked business events.
5. Choose the academic year and academic session (Copy To frame).
   - If you set the indicator Take Sess. (Session) Pattern into Account, the system only processes the event templates it offers in the selected academic year and academic session (Copy To frame).
6. Set the indicator for test run or parallel processing, if required.
7. Choose the pushbutton with the quick info text Execute.

To copy the event offerings of an academic session, proceed as follows:

1. Choose a selection method [Page 29] and selection variant. The system uses the selection method to find modules. Then it determines the event offerings (event packages and academic events) for the modules.
2. Choose the processing type Copy Business Events.
3. If you want the system to check whether it already used event offerings to copy from, set the indicator “Check If Already Copied”.
4. Specify if you want to copy planned or firmly booked business events.
5. Choose an academic year and academic session (in the Copy From and Copy To frames).
   - If you set the indicator Take Sess. (Session) Pattern into Account, the system processes only those modules and event packages which are offered in the selected academic year and academic session (Copy To frame).
6. To further restrict the business event selection, set the appropriate indicator in the Copy Business Events with Following Attributes frame.
7. Set the indicator for test run or parallel processing, if required.
8. Choose the pushbutton with the quick info text Execute.

Result

The new academic period contains the event offerings you selected from the template or from the given academic period.

The system automatically creates the business events you create with this program as business events with the schedule category regular schedule. These business events have a schedule and resource description (schedule elements) which you can edit in the event offering editing transaction (transaction code PIQACADOFFER00).
1.2.3.3.7 Creating Templates for Event Offerings

You can create templates from existing event offerings to save you from having to create and edit event offerings from scratch for every academic session. You can use these templates when you copy event offerings.

Prerequisites

- You have created event offerings for one or more modules, which you can then use as a basis for templates.
- Your system administrator has set up session patterns in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data ➔ Academic Structure ➔ Modules (or Event Packages).

You can use a session pattern, for example, if you want to offer a certain module or event package in every winter session or in every second summer session. You can also use session patterns to create event offering templates for a specific session.

Procedure

1. On the SAP Easy Access screen, choose Student Lifecycle Management ➔ Academic Structure (Curriculum) ➔ Study Planning ➔ Module Catalog ➔.
2. Using the object manager, select a module with an event offering.
3. Select the module, and choose Environment ➔ Edit Event Offering ➔ (or the Edit Event Offering push-button).
   
   The Edit Event Offering screen appears.
4. If you want the system to create templates for event offerings automatically, choose Goto Templates ➔ Create Templates for Event Offerings ➔.
5. Enter the required selection criteria in the dialog box that appears.
   - Choose the organizational unit to which the module belongs. You can also select only the module.
   - Enter the academic year and session.
   - Choose Continue to confirm your entries.
   
   The system then displays all the event offerings that match the specified selection criteria.
6. Select the event offerings from which you want to create templates, and choose Save.
   
   The system generates templates from these event offerings.
   
   If you want to create and edit templates for event offerings manually, choose Goto Offering Templates ➔ Create Template (With Selection) ➔ or Maintain Template on the Edit Event Offering screen.

1.2.3.3.8 Creating/Maintaining Programs

I. Creating a Program

1. From the SAP menu, choose Student Lifecycle Management ➔ Academic Structure (Curriculum) ➔ Study Planning ➔ Program of Study.
   
   The Edit Program of study screen appears. The system uses the object manager [Page 26], which is a convenient user tool for program search and selection.
2. Enter the start date of the program you are creating.
You can create a new program using an existing program as a template. To do so choose this program from the object manager selection area, and then choose (Use copy).

3. To create a program without using a template, choose (Create).
   The Create Program of study: Data Screen appears.
4. Enter an abbreviation and a name for the program.
5. Enter the required data on the respective tab pages:

<table>
<thead>
<tr>
<th>Tab Page</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>General description of the program</td>
</tr>
<tr>
<td>Program data</td>
<td>Required program data including the program plan, session variant, program duration, etc.</td>
</tr>
<tr>
<td>Capacity</td>
<td>Minimum, optimum and maximum capacity of the program</td>
</tr>
<tr>
<td>Fee calculation data</td>
<td>Data for calculation of student fees</td>
</tr>
<tr>
<td>Disciplines</td>
<td>Field of study of the program</td>
</tr>
<tr>
<td>Relationships</td>
<td>Relationships between the program and other objects</td>
</tr>
<tr>
<td></td>
<td>If you want to assign modules or module groups to the program, choose (Create).</td>
</tr>
<tr>
<td>Program credits</td>
<td>Minimum and maximum number of credits for the program, and if required, the credits for each stage</td>
</tr>
<tr>
<td>Further information</td>
<td>Evaluation and cost distribution data</td>
</tr>
<tr>
<td></td>
<td>Choose (Create).</td>
</tr>
</tbody>
</table>

6. Choose (Save).

II. Maintaining a Program

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Program of Study.
2. Select the program you want to change using the object manager [Page 26].
3. To change the selected program, choose (Change). The Maintain object screen appears.
4. Maintain the required infotypes of the program, and save the changes in each infotype by choosing (Save).

1.2.3.3.9 Creating/Maintaining Modules

I. Creating a Module

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module.
   The Edit Module screen appears. The system uses the object manager [Page 26], which is a convenient user tool for module search and selection.
2. Enter the start date of the module you are creating.
You can create a new module using an existing module as a template. To do so choose this module from the object manager selection area, and then choose (Use copy).

3. To create a module without using a template, choose (Create).

The Create Module: Data Screen appears.

4. Enter an abbreviation and a name for the module.

5. Enter the required data on the respective tab pages:

<table>
<thead>
<tr>
<th>Tab Page</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>General description of the module</td>
</tr>
<tr>
<td>Capacity</td>
<td>Minimum, optimum and maximum capacity of the module</td>
</tr>
<tr>
<td>Disciplines</td>
<td>Field of study of the module</td>
</tr>
<tr>
<td>Module credits</td>
<td>Minimum, optimum and maximum credits for the module</td>
</tr>
<tr>
<td>Fee calculation data</td>
<td>Data for calculation of student fees</td>
</tr>
<tr>
<td>Module attributes</td>
<td>Academic level, category, and repetition type of the module</td>
</tr>
<tr>
<td>Relationships</td>
<td>Relationships between the module and other objects</td>
</tr>
<tr>
<td></td>
<td>To link a module with programs or module groups, choose (Create).</td>
</tr>
<tr>
<td>Further information</td>
<td>Evaluation and cost distribution data</td>
</tr>
<tr>
<td></td>
<td>Choose (Create).</td>
</tr>
</tbody>
</table>

6. Choose (Save).

II. Maintaining a Module

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module.

2. Select the module you want to change using the object manager [Page 26].

3. To change the selected module, choose (Change).

   The Maintain object screen appears.

4. Maintain the required infotypes of the module, and save the changes in each infotype by choosing (Save).

1.2.3.3.10 Creating/Maintaining Module Groups

Prerequisites

Your system administrator has made the required module group settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Structure → Module Groups.
Procedure

I. Creating a Module Group

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Group.

   The Edit Module Group screen appears. The system uses the object manager [Page 26], which is a convenient user tool for module group search and selection.

2. Enter the start date of the module group you are creating.

   You can create a new module group using an existing module group as a template. To do so choose this module group from the object manager selection area, and then choose (Use copy).

3. To create a module group without using a template, choose (Create).

   The Create Module Group: Data Screen appears.

4. Enter an abbreviation and a name for the module group.

5. Choose the Description tab page, and enter a general description of the module group.

6. Choose the Module Group Data tab page, and assign a module group category to the module group.

7. Choose the Relationships tab page, and maintain the relationships that exist between the module group and other objects (program, module, etc.).

8. Choose (Save).

II. Maintaining a Module Group

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Module Group.

2. Select the module group you want to edit using the object manager [Page 26].

3. Choose (Change).

   The Maintain object screen appears.

4. Maintain the required infotypes of the module group, and save the changes in each infotype by choosing (Save).

1.2.3.4 Module Booking

Use

You can use this process to book modules for students. You can also book individual work [Page 106] using the module booking application.

When you book a module, you can apply different rules to determine whether or not the module booking is allowed. These can be academic rules such as booking prerequisites, or administrative rules such as a booking deadline or an active registration prerequisite. In addition to administrative and academic rule checks, you can also run technical checks for capacity, time conflicts, or availability within the academic period.

If not all of the booking prerequisites are fulfilled when you make a booking, you can create a conditional booking with open prerequisites [Page 91].

You can either book students on individual modules or on a list of modules.

You can offer module booking as a student self-service function.
Prerequisites

You have made the settings for module booking in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Module Booking.

You can configure the system so that a module booking automatically triggers registration or re-registration for a program in the selected academic period. You can make this setting in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Admission, Registration, and De-registration → Sessional Registration → Define Mode for Registration/Re-registration.

You have created modules and the associated business events and event packages. You create modules in the Module Catalog [Page 76]. You can create the business events and event packages for a module when you edit event offerings and in the module catalog.

You have created the individual work you want to assign to students.

Process Flow

1. Choose a student in the student file.
2. Choose the program content (Goto → Program Content). The Maintain Modules in Program screen appears.
3. Choose the Selection tab page.
   On this tab page you can enter the academic period, and the stage if required. If you want to display a list of the modules available for booking, choose the Modules pushbutton. You can use the Object Manager [Page 26] to choose specific modules directly.
4. Choose a module, and a business event or event package if desired, and choose Copy Selection.
   If you do not offer any event packages, you can book students for modules and for the business events offered within these modules.
5. Save the action.

Result

You have booked a student on a module in the module catalog.

1.2.3.4.1 Capacity Check During Module Booking

Use

When you book a module, the system checks the maximum capacity of the following objects:
- Modules [Page 87] (object type SM)
- Event packages [Page 23] (object type SE)
- Business events [Page 22] (object type E)

If the maximum capacity of one of these objects is exceeded when you book a module, the system outputs an error message.

Features

The capacity check is run only for module booking but not for event planning.

The capacity check is performed within the module, and is always run separately for each object (module, assigned event package, assigned business event).

In "short-lived" objects such as business events (object type E), the capacity value refers to the total number of bookings for this object. However in "long-lived" objects such as modules (object type SM), the capacity...
value refers to the bookings for each academic session. A maximum capacity of 50 places at the module level does not mean that only 50 students can book this module during the entire module validity period. When you create a booking, the system determines how many bookings this module already has in the relevant academic session and compares this value with the capacity specified for the module.

You can use the message control function to override the error message which the system outputs when the given capacity is exceeded, and by doing so, overbook objects. Before you can use this function, you must create a rule container (object type RC), link this rule container with callup point 0003 (Module Booking (Single)), and configure the message control function appropriately. Please note that message control is user-dependent. For more information, see Overriding the Message Log [Page 122].

The system does not automatically check the capacity when you create a re-registration or admission. When you perform these activities, the system calls the VSR rules; you can therefore set up a capacity check by creating the required rule container and assigning this rule container to the relevant callup point.

Examples

1. Example:
The maximum capacity of module SM1 is 50 places. The capacity of the assigned business events E1 and E2 is 20 places each.

40 bookings are therefore possible in this case. The 41st booking will not automatically be made as both business events are already booked to capacity. The university must then decide if it wants to schedule a third business event with 10 places to fully book this module. (Alternatively, the university could overbook one of the business events using the message override function.)

Extension of Example 1:
As both business events are booked, the university has scheduled another business event E3 with 20 places. You can now make another 10 bookings until the 50 places reserved for the module are fully booked. Then no more bookings can be made for business event E3, even if 10 places are still available. (For example, if business event E3 were also assigned to a module that has no bookings, additional bookings could be made.)

2. Example:
The maximum capacity of module SM2 is 100 places. The capacity of the assigned event packages SE1 and SE2 (same content) is 50 places each.

Event package SE1 includes lecture E1.1 with 50 places and tutorials E1.2 and E1.3 with 25 places each. Event package SE2 includes lecture E2.1 with 50 places, and tutorials E2.2 and E2.3 with 20 places each.

As tutorials E2.2 and E2.3 each have only 20 and not 25 places, they can only absorb 90 module bookings and not 100.

1.2.3.4.2 Conditional Booking for Open Prerequisites

Use

Prerequisites which are defined by means of relationship 529 (needs prerequisite/is prerequisite of) or 533 (is corequisite of) contain a conditional booking option. This also applies to conditions which are stored in rule containers. This option enables you to book modules conditionally.

In cases where a prerequisite or corequisite is open (unfulfilled) when a module is booked, you or the system can book this module conditionally by setting the conditional booking indicator.
A student wants to book *Biology 2E03* which requires successful completion of *Biology 1A06*. At the time of booking, the student is booked on *Biology 1A06* but has not yet completed this module. If the *conditional booking* option is set in relationship 529 between these two modules, you (or the system) can book the *Biology 2E03* module conditionally. The conditional booking indicator can be removed when the student has completed the *Biology 1A06* module.

**Integration**

Relationship 509 (*is used by/uses*) contains a conditional booking option for rule checks in the VSR environment. If this indicator is set and the checks which are performed for validations in the VSR rules return an error message, the system does not block module booking but will allow the module to be booked conditionally. However, this only applies for extended rule checks of the rule container. You set the *extended check* indicator in the *rule container* object of the *Rule Modules* infotype (1747). If the VSR rule check in question is not an extended rule check, the system responds as if the conditional booking option were not set for relationship 509.

Extended rule checks must be fulfilled for unconditional bookings, but not for conditional ones. If extended checks fail and the *conditional booking indicator* is set for rule checks which are performed for rule containers and objects of the academic structure linked by relationship 509, you or the system can make a module booking anyway. The result of the module booking with relationship 506 (*completes/is completed by*) is conditional in this case.

**Features**

The system can determine module booking prerequisites which have not been fulfilled as open prerequisites. If the *conditional booking indicator* is set for relationship 529 or 533 between modules, these modules can be booked conditionally if the specified prerequisite is still open.

The *conditional booking indicator* is located in the relationship *additional data*.

A conditional booking can either be made automatically by the system (type A) or manually by the system administrator (type M). Conditional bookings can be removed manually (for type A and type M) or automatically during a booking check (only type A).

The conditional booking itself is characterized by an entry in the conditional booking field of relationship 506.

You make the settings required to override the prerequisite check in Customizing for *Student Lifecycle Management* under *Student Lifecycle Management Processes* → *Module Booking* → *Business Add-Ins (BAdIs)* → *BAdI: Override Prerequisite Check*.

The RFC function module HRIQ_STUDENT_BOOKING for module booking contains the export parameter EV_COND_BOOKINGS. This parameter contains the value A if conditional bookings were created in a booking activity.

**Activities**

You can edit conditional bookings in the following ways:

- In the module booking dialog (program content)
  - Select the conditional booking, and choose ✍️ with the quick into text *Change Bkg Record*.
    - You can determine if the conditional booking was set automatically (type A) or manually (type M) by the value in the *Cond. Bkg* field.
    - You can display the message log the system created for a conditional booking by choosing ✉️ with the quick info text *Conditional Booking Logs*.
    - You can run a conditional booking check from the *Change Module Booking* dialog by choosing ✉️ with the quick info text *Check/Correct Cond. Booking*. The system checks if the condition is
still set for the booking. Depending on the result of the check, you can either remove the condition or cancel the booking.

You can create your own conditional booking check program using the sample program RHIQCBF0 (*Checks and Follow-Up Processes for Conditional Module Bookings*) as a template. When you run a conditional booking check, the system checks only those rule containers that apply for the conditional booking.

- In the academic work overview of the student file extended maintenance dialog
  In the extended maintenance dialog of the student file, you can edit the conditional bookings without any system checks.
- In the relevant object data record of infotype 1001 (*Relationships*)
  The *conditional booking indicator* is located in the relationship *additional data*.

### 1.2.3.4.3 Waiting Lists

**Use**

You can keep waiting lists for module bookings. This enables you to continue booking modules, business events or event packages even when the optimum and maximum capacity has already been reached. In this case, the system makes the bookings to a waiting list.

You can keep waiting lists for the following object types:

- Modules (object type SM)
- Event packages (object type SE)
- Business events (object type E)

When you define for which of these object types the system should keep waiting lists, you choose the waiting list level. You can either define the waiting list level globally for all modules in Customizing for *Student Lifecycle Management* (see below), or separately for each module in the *Module Data* infotype (1746).

Whether or not a booking is a waiting-list booking is defined by the booking priority stored in relationship 506 between the *student* (object type ST) and the *module*. The booking priority is a number between 0 and 99. You can define the priority area for each booking type (waiting-list booking, normal booking, and essential booking) in Customizing for waiting lists (see below). Waiting-list bookings usually have high priority numbers, for example, between 80 and 99.

When you define booking priorities, you must make sure to synchronize the priority settings in *Student Lifecycle Management* with those in *Training and Event Management*. This ensures that the business event bookings which are linked to module bookings are handled in the same way as the higher-level module bookings.

If a non-SAP system contains waiting-list bookings for modules or business events, you must assign the appropriate booking priority to them in the PRIOX field of relationship 506 for module bookings and relationship 025 for business event bookings. The value of this field depends on your waiting list Customizing settings.

**Prerequisites**

You can make the settings for waiting lists in Customizing for *Student Lifecycle Management* under *Student Lifecycle Management Processes* → *Module Booking* → *Waiting Lists*.

**Activities**

You can either make waiting-list bookings manually in the booking dialog (booking details), or have the system make them automatically. In the latter case, the system automatically saves the bookings that exceed the given module or event package capacity as waiting-list bookings. This automatism does not
apply to waiting lists at the business event level. However, you can create waiting-list bookings for business events manually when the optimum and maximum capacity have been reached.

The system offers a program for waiting list administration that enables you to view and sort waiting lists, and start move-up processes. You can access this program from the SAP Easy Access screen by choosing SAP Menu → Student Lifecycle Management → Student Administration → Reports → Waiting List Administration.

1.2.3.5 Event Planning

In "Event Planning" you edit and organize events. You can perform the following tasks:

- Edit Event Offerings
- Copy Event Offerings
- Edit Academic Events
- Edit Event Packages
- Evaluate Teaching Workload
- Plan Resources

1.2.3.5.1 Editing Event Offerings

Event offerings is a collective term for the academic events and event packages that are offered within a module. You can create or edit event offerings, either when you want to create a new module, or when you want to change an existing module in a program of study.

You can edit event offerings in the specially designed transactions Edit Event Offerings (transaction code PIQACADOFFER00) and Edit Event Offerings for Cohorts (transaction code PIQACADOFFER01), as well as in the Module Catalog (transaction code PIQACCATLG).

You can create or edit your event offerings during the planning phase as well as during the execution phase. You can also define exceptions within event offerings.

There are display transactions available for event planning, which can be used for reporting purposes. They are PIQACADOFFER00_D and PIQACADOFFER01_D. These transactions allow you to get an overview of module bookings, room and event capacities, and cross-listed modules.

Prerequisites

You have made the required settings in the Customizing for Student Lifecycle Management under 📝 Student Lifecycle Management Master Data ➔ Academic Structure ➔ Event Planning 📝.

You have set up an academic structure comprising modules and event types. Using this structure as a basis, you can create and change academic events, and assign them to event packages.

You have defined the event types, resource types and delivery mode.

- Event types
  Event types define which types of academic events have to be created for a module. For example, lectures, tutorials or e-learning courses.

- Resource types
  Resource types define which types of resources are required for an academic event. Resources can be rooms, materials or tutors. For example, lab rooms, overhead projectors or mathematics professors. For more information, see Resource Planning.

- Delivery mode
  Delivery mode defines the way in which an event is delivered to the student.
Features

In this transaction, you can create a new academic event or event package, and if required, both can be created together.

You can assign academic events to event packages.

A calendar view of an event schedule is available, which can also be used to see resource bookings.

As well as the access object and academic period, you can define additional Selection Criteria for listing event offerings. This selection criteria can be saved as default as per user.

The additional selection criteria include the following parameters:

- **Processing status**
  You can define customer-specific processing status values in Customizing for Student Lifecycle Management (see Prerequisites section above). The system saves the processing status of a business event in the Academic Event Info infotype.

- **Campus**
  You can choose the campus or location of the event or event package.

- **Stage**
  You can only use this selection criterion if you selected Program as the access object.

- **Only Offered**
  You use this indicator to display the modules and event packages that are offered in the selected academic period. You define the sessions of offering for modules and event packages in the Module Catalog.

- **Planning status**
  Academic events (with the exception of time-independent events) can have the planning status Planned and Firmly Booked.

- In the Customizing for Student Lifecycle Management (see Prerequisites section above), you can specify the planning status to which the system should default when you create an academic event.

  You can firmly book planned academic events. For more information, see Firm Booking of Business Events.

When you enter selection criteria and then choose Find Offering, the system lists the event offerings that match the given criteria. You can execute the following activities for the event offerings listed:

- **Edit event packages**
  You can create and edit event packages in the overview screen for editing event offering. The system jumps to the data editing screen of that event package.

- **Edit academic events**
  In the detail screen of each academic event, you can jump to editing teaching workload and define the teaching workload for the academic event.

By choosing Goto Expert View, you can switch from editing event offering (transaction code PIQACADOFFER00) to editing business event in the module catalog.

The overview screen for editing event planning also contains the following functions:

- Firmly book business events
- Cancel module, event package, or academic event
- Show schedule
- Show resources
You can change event offering templates by choosing ➔ Go to ➔ Edit Templates. If you want to create new templates for event offerings, switch to the module catalog by choosing ➔ Go to ➔ Expert Mode. You can create the templates on the Edit Event Offering screen of the module catalog. For more information, see Creating Templates for Event Offerings.

Activities

Based on the academic period, you can list and edit the event offerings using the following access objects:

- Organizational unit (object type O)
- Program of study (object type SC)
- Module group (object type CG)
- Module (object type SM)
- Person (object type P), external person (object type H) or student (object type ST)

These access objects are only relevant if the person, external person, or student is also an instructor and an event offering is assigned to him or her.

To edit an event offering, go to the SAP Easy Access screen and choose ➔ SAP Menu ➔ Student Lifecycle Management ➔ Event Planning ➔ Edit Event Offering.

- Choose the access object and academic period.
- Check the key date.
- Define the additional selection criteria.

When you choose Find Offering, the system lists the event offerings for the specified selection criteria.

To edit objects in the list, switch to the change mode by choosing Display <-> Change.

1.2.3.5.2 Copying Event Offerings

You can use the function for copying event offerings to create academic events for a specific academic period. This function simplifies your event planning tasks.

You can create academic events using event offering templates, or copy existing event offerings from previous academic periods.

Event offering templates serve as a blueprint for event offerings. When you create academic events, you use this blueprint and the processing type Create Business Events from Business Event Templates as a basis. You can also change the business events you have created and adjust them to the specific requirements of the academic period.

Event planning can also be based on business events from previous academic periods and on the processing type Copy Business Events.

Integration

The system automatically creates the business events you define using this program as business events with the schedule category Regular Schedule. Business events of this type have a schedule and resource description (schedule elements), which you can edit in the event offering editing transaction (transaction code PIQACADOFFER00).

1.2.3.5.2.1 Copying Event Offerings

Use

You can use this procedure to copy event offering templates or the event offerings that exist in a specific academic period to a new academic period.
Prerequisites

Before you can copy an event offering, you need to have event offering templates or event offerings in a previous academic period.

Procedure

We recommend you execute a test run before each update run.

Bear in mind that this report requires considerable system resources. We therefore recommend that you schedule a background job for the update run, and copy only small units of data (for example, one organizational unit at a time).

From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Event Planning → Create Event Offering from Template. The Create Academic Events screen appears.

To copy event offering templates, proceed as follows:

   The system uses the selection method to find modules. Then it determines the event templates for the modules.
2. Choose the processing type Create Business Events from Event Templates.
3. If you want the system to check if it already used event templates to create business events, set the indicator “Check If Already Copied”.
4. Specify if you want to copy planned or firmly booked business events.
5. Choose the academic year and academic session (Copy To frame).
   If you set the indicator Take Sess. (Session) Pattern into Account, the system only processes the event templates it offers in the selected academic year and academic session (Copy To frame).
6. Set the indicator for test run or parallel processing, if required.
7. Choose the pushbutton with the quick info text Execute.

To copy the event offerings of an academic session, proceed as follows:

   The system uses the selection method to find modules. Then it determines the event offerings (event packages and academic events) for the modules.
2. Choose the processing type Copy Business Events.
3. If you want the system to check whether it already used event offerings to copy from, set the indicator “Check If Already Copied”.
4. Specify if you want to copy planned or firmly booked business events.
5. Choose an academic year and academic session (in the Copy From and Copy To frames).
   If you set the indicator Take Sess. (Session) Pattern into Account, the system processes only those modules and event packages which are offered in the selected academic year and academic session (Copy To frame).
6. To further restrict the business event selection, set the appropriate indicator in the Copy Business Events with Following Attributes frame.
7. Set the indicator for test run or parallel processing, if required.
8. Choose the pushbutton with the quick info text Execute.

Result

The new academic period contains the event offerings you selected from the template or from the given academic period.

The system automatically creates the business events you create with this program as business events with the schedule category regular schedule. These business events have a schedule and resource description
(schedule elements) which you can edit in the event offering editing transaction (transaction code PIQACADOFFER00).

1.2.3.5.3 Creating Templates for Event Offerings

You can create templates from existing event offerings to save you from having to create and edit event offerings from scratch for every academic session. You can use these templates when you copy event offerings.

Prerequisites

- You have created event offerings for one or more modules, which you can then use as a basis for templates.
- Your system administrator has set up session patterns in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data ➔ Academic Structure ➔ Modules ➔ Event Packages).

You can use a session pattern, for example, if you want to offer a certain module or event package in every winter session or in every second summer session. You can also use session patterns to create event offering templates for a specific session.

Procedure

1. On the SAP Easy Access screen, choose Student Lifecycle Management ➔ Academic Structure (Curriculum) ➔ Study Planning ➔ Module Catalog ➔.
2. Using the object manager, select a module with an event offering.
3. Select the module, and choose Environment ➔ Edit Event Offering ➔ (or the (Edit Event Offering push-button).

The Edit Event Offering screen appears.

4. If you want the system to create templates for event offerings automatically, choose Goto ➔ Templates ➔ Create Templates for Event Offerings ➔.
5. Enter the required selection criteria in the dialog box that appears.
   - Choose the organizational unit to which the module belongs. You can also select only the module.
   - Enter the academic year and session.
   - Choose Continue to confirm your entries.

The system then displays all the event offerings that match the specified selection criteria.

6. Select the event offerings from which you want to create templates, and choose Save.

The system generates templates from these event offerings.

If you want to create and edit templates for event offerings manually, choose Goto ➔ Offering Templates ➔ Create Template (With Selection) ➔ or Maintain Template on the Edit Event Offering screen.

1.2.3.5.4 Event Offerings for Cohorts

You can also edit event offerings for cohorts. When compared to editing event offerings (transaction code PIQACADOFFER00), event offering editing for cohorts (transaction code PIQACADOFFER01) differs in the following ways:
• In the selection screen, you can only enter the following data:
  o Cohort
  o Academic period
  o Key date
• When you create a new academic event object for a cohort in transaction PIQACADOFFER01, the system automatically assigns this object to the cohort as a context object.
• You cannot assign an existing academic event, event package or module to a cohort in transaction PIQACADOFFER01. You must assign these objects to the cohort as context objects in the cohort builder.
• You cannot create business event types and modules in this transaction. You must use the transactions that are intended for this purpose.

Prerequisites
You have created the required cohort and assigned this cohort the relevant module as a context object. You can also assign event packages and academic events to a cohort as context objects.

1.2.3.5.5 Editing Academic Events
Academic events can be divided into the following four categories:
• Business event with a regular schedule (object type E)
• Business event with an irregular schedule (object type E)
• Business event without a schedule (object type EL)
• Time-independent event (object type EL)
You can create or change academic events on the overview screen for editing event offerings. The detail screen for editing business events appears.

To assign resources to academic events, choose Resource Planning.

Business Events with a Regular Schedule
Business events with a regular schedule can have the following schedule categories:
• Regular schedule (without exceptions)
  The dates list is the same as the generated schedule.
• Regular schedule with exceptions
  There is at least one interruption to the business event dates list, in other words, the dates list deviates from the generated schedule. In this case, you define an exception to the generated schedule for at least one of the following points:
  o Date
  o Time
  o Instructor
  o Room

Business Events with an Irregular Schedule
You create a business event with an irregular schedule if the dates on which the event takes place do not have a regular pattern (for example, one-off or sporadic business events), and the dates list and resource assignments only apply to this particular event. A business event with this schedule category does not have a schedule description.
Business Events Without a Schedule

You create a business event without a schedule if you do not know exactly when this event will take place. When the date and time of the event become known, you can define a schedule for it on the overview screen for editing event offerings, by choosing Schedule Business Event. This causes the system to change the object type from EL to E.

Time-Independent Events

A time-independent event is an academic event without a set schedule or location, for example, an e-learning offering. When you create a time-independent event, you must choose a business event type with an appropriate delivery mode. To assign the object type to the delivery mode, choose

Student Lifecycle Management → Student Lifecycle Management Master Data → Academic Structure → Business Event Types → Create Delivery Modes.

in Customizing for Student Lifecycle Management.

Activities

To create a business event, enter the business event data on the detail screen. If you want to generate a schedule for the business event, enter a schedule description and choose Save. The system assigns a schedule category to the business event.

Business Events with the Schedule Category “Regular Schedule”

To create a business event with a regular schedule, enter the business event data and schedule description in the detail screen. Then choose Save to generate the schedule. The system assigns a schedule category Regular Schedule to the business event. When the system generates the schedule, it creates a list with the schedule and resource booking.

You can regenerate the schedule on the detail screen, as well as on the overview screen for editing event offerings. To display the schedule data, choose Show Schedule on the overview screen.

If you do not change the start or end date in the schedule description, the system uses the start and end dates of the class period (time limit 0200) in the business event's academic period. However, if you change the start or end date in the schedule description (for example, begins two weeks before the start of the class period), the system uses the date you enter. Entry of a different start or end date is optional.

You can edit the teaching workload for this business event by choosing Teaching Workload on the detail screen.

If the business event has a regular schedule (without exceptions), the system assigns every date to the selected room and instructor. If you want to assign different rooms and instructors, you must first define exceptions (by choosing Exceptions) which causes the system to activate Resource Planning.

Editing Business Events and Assigning a Schedule Category

If you want to create a business event with the schedule category regular schedule with exceptions, you must first create a business event with a regular schedule. After you have generated the schedule, choose the pushbutton Exceptions. Then, you can define exceptions in the schedule or resource reservation.

When you choose the Exceptions pushbutton, the system activates the Resource Reservation pushbutton. You can use this pushbutton, for example, to assign a different instructor for a certain date.

When you save the exceptions, the system changes the schedule category of the business event from regular schedule to regular schedule with exceptions.

You can change the resource reservation and dates list in the detail screen. In the overview screen for event offering editing, you can only change the resource reservation and dates of regular schedules without exceptions but not of regular schedules with exceptions.

You can reset the exceptions for a regular schedule.
When you reset the exceptions or regenerate the schedule, all exceptions are lost and the business event again has a regular schedule without exceptions.

### 1.2.3.5.1 Editing Business Events with a Regular Schedule

You can create or change business events (object type E) with a regular schedule in the overview screen for event offering editing. The system jumps to the detail screen for business event editing.

Business events that have a regular schedule can have the following differences in their schedule category:

- **Regular schedule (without exceptions)**

  The dates list of this business event is fully described by the generated schedule elements. This is the case if you do not define any exceptions in the schedule or in the resource assignment after you have generated the schedule.

  Business events with the following dates have a regular schedule:
  - During the class period on Mondays from 9:30 to 11:00 and on Thursdays from 14:00 to 15:00, always in room A3 and always with the same instructor.
  - Two weeks after the start of the class period on Wednesdays from 8:00 to 10:00 on 15 dates.

- **Regular schedule with exceptions**

  The regularity of the business event dates list is broken at least once, in other words, the dates list deviates from the generated schedule. In this case, you have defined an exception from the generated schedule and at least one variance in the following data:
  - Date
  - Time
  - Instructor
  - Room

### Activities

**Business Events with the Schedule Category Regular Schedule**

If you want to create a business event with a regular schedule, enter the business event data and schedule description in the detail screen. Then generate the schedule by choosing the appropriate pushbutton or by saving the data. The business event is assigned the schedule category *regular schedule*. When the system generates the schedule, it creates a list with the schedule and resource reservation.

You can regenerate the schedule in the detail screen as well as in the overview screen for event offering editing. To display the schedule data, choose the pushbutton *Show Schedule* on the overview screen.

If you do not change the start or end date in the schedule description, the system uses the start and end dates of the class period (time limit 0200) in the business event's academic period. However, if you change the start or end date in the schedule description (for example, begins two weeks before the start of the class period), the system uses the date you enter. Entry of a different start or end date is optional.

You can edit the teaching workload for this business event by choosing the *Teaching Workload* pushbutton in the detail screen.

If the business event has a regular schedule (without exceptions), the system assigns every date to the selected room and instructor. If you want to assign different rooms and instructors, you must first define exceptions (*Exceptions* pushbutton) and thus activate the *Resource Planning* pushbutton.
Business Events with the Schedule Category

Regular Schedule with Exceptions
If you want to create a business event with the schedule category regular schedule with exceptions, you must first create a business event with a regular schedule. After you have generated the schedule, choose the pushbutton Exceptions. Then, you can define exceptions in the schedule or resource reservation.

When you choose the Exceptions pushbutton, the system activates the Resource Reservation pushbutton. You can use this pushbutton, for example, to assign a different instructor for a certain date.

When you save the exceptions, the system changes the schedule category of the business event from regular schedule to regular schedule with exceptions.

You can change the resource reservation and dates list in the detail screen. In the overview screen for event offering editing, you can only change the resource reservation and dates of regular schedules without exceptions but not of regular schedules with exceptions.

You can reset the exceptions for a regular schedule.

When you reset the exceptions or regenerate the schedule, all exceptions are lost and the business event again has a regular schedule without exceptions.

1.2.3.5.5.2 Editing Business Events with an Irregular Schedule
You can create or change business events (object type E) with an irregular schedule in the overview screen for event offering editing. The system jumps to the detail screen for business event editing.

You create a business event with an irregular schedule if the dates on which the event takes place show no regular pattern (for example, one-time or sporadic business events), and the dates list and resource assignments apply only for this particular event. A business event with this schedule category does not have a schedule description.

Features
You can change the resource reservation and dates list in the detail screen but not in the overview screen for event offering editing.

You can edit the teaching workload for this business event by choosing the Teaching Workload pushbutton in the detail screen.

1.2.3.5.5.3 Editing Business Events Without a Schedule
You can create or change business events without a schedule (object type EL) in the overview screen for event offering editing. The system jumps to the detail screen for editing business events without a schedule.

You create a business event without a schedule if you do not know exactly when this event will take place. When the date and time of the event become known, you can define a schedule for it in the overview screen for event offering editing (see below).

Features
You can edit the teaching workload for business events without a schedule by choosing the Teaching Workload pushbutton in the detail screen.

If you want to schedule a business event that as yet has no schedule, select the business event in the overview screen for event offering editing and choose the Schedule Business Event pushbutton. By doing so, you can change a business event without a schedule to a business event with a regular schedule (with or without exceptions). The system changes the object type from EL to E when you schedule a business event without a schedule.

When you schedule a business event, you can assign it resources like rooms and instructors in the detail screen.
1.2.3.5.5.4 Editing Time-Independent Events

You can create or change time-independent events (object type EL) in the overview screen for event offering editing. The system jumps to the detail screen for business event editing.

Prerequisites

When you create a time-independent event, you must choose a business event type with an appropriate delivery mode. The object type *time-independent event* must be assigned to the delivery mode of the business event type. You assign the object type to the delivery mode in Customizing for *Student Lifecycle Management* in the IMG activity *Create Delivery Modes*. You assign the delivery mode to the business event type when you create the business event type.

Features

You can assign an instructor to a time-independent event in the detail screen.

You can edit the teaching workload for a time-independent event by choosing the *Teaching Workload* pushbutton in the detail screen.

1.2.3.5.6 Editing Event Packages

You can create and edit event packages in the overview screen for event offering editing. The system jumps to the respective event package data editing screen.

Integration

To assign business events to an event package, choose ➔ *Goto Expert Mode*. The system jumps to business event editing in the Module Catalog where you can make the necessary assignments and save them.

1.2.3.5.7 Teaching Workload Evaluation

You can enter teaching workload data for academic events. The teaching workload comprises the number and unit of contact hours, as well as the different teaching activities and the teaching effort required for each.

You can specify teaching workload data for the following objects:

- Business event (object type E)
- Time-independent event (object type EL)
- Individual work (object type CI)
- Business event type (object type D)

In the business event types (object type D), you define the teaching workload as a default value. The system uses this default value when you create business events, time-independent events or individual work on the basis of a business event type. What the system actually does is assign the teaching workload to the respective object in the *Teaching Workload* infotype (1753).

You can use teaching workload data in user-defined reports, for example, to settle payment for teaching activities, to compare planned and actual teaching workload data, or to compare total teaching effort with the teaching effort of individual persons. SAP does not provide any reports for such purposes as requirements vary greatly from one university to another.

Integration

You can assign a teaching workload to a person or an external person. The system saves this assignment in relationship 543 (*expends effort for/requires effort by*). You can also split the teaching workload between two persons.

You can store the teaching hours of individual instructors in the HR Funds and Position Management component (PA-PM-FP).
Prerequisites

You have made the settings for teaching workload in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data ➔ Academic Structure ➔ Teaching Workload 📹. You have also observed the tips on how to set up the teaching workload which are given there.

When you assign a teaching activity while editing the teaching workload, the system shows the unit of the teaching activity. This unit is assigned to the teaching activity via the teaching activity grouping of this teaching activity. You can assign teaching activities to teaching activity groupings in Customizing for Student Lifecycle Management in the Define Calculation Rules for Teaching Activities IMG activity. A teaching activity which is not assigned to a teaching activity grouping does not have a unit.

Activities

You can enter the teaching workload for the above objects with the following transactions:

- Edit event offerings (transaction code PIQACADOFFER00)
- Edit event offerings for cohorts (transaction code PIQACADOFFER01)
- Module catalog (transaction code PIQ_ACCATLG)

1.2.3.5.8 Resource Planning

In Resource Planning you choose the resources required for an event. Resources can be classrooms, materials, and instructors. Resources are grouped into resource types, which you can assign to events and event types.

You can search for resources in two ways:

- Standard Resource Search
  This search only displays the resources that are available for the event type you have specified.
- Free Search
  This search displays all resources that match your selection criteria, and checks their availability afterwards.

More Information

For more information, see Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data ➔ Academic Structure ➔ Integration of Training and Event Management ➔ Training and Event Management ➔ Business Event Preparation ➔ Resource Management 📹.
1.2.3.6 Overview of (Internal) Academic Work

The following graphic shows the scope of internal academic work in Student Lifecycle Management:

![Diagram showing the scope of internal academic work](image)

The elements of internal academic work are explained in the following table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic work</td>
<td>Academic work includes module work and miscellaneous academic work, both of which can be completed or transferred.</td>
</tr>
<tr>
<td>Transferred work</td>
<td>Academic work which the equivalency determination application (transaction PIQED) acknowledged as equivalent to internal academic work.</td>
</tr>
<tr>
<td>Completed work</td>
<td>Academic work completed at the university. Completed academic work can have different booking and appraisal statuses.</td>
</tr>
<tr>
<td>Module work</td>
<td>See module work.</td>
</tr>
<tr>
<td>Miscellaneous academic work</td>
<td>See miscellaneous academic work</td>
</tr>
</tbody>
</table>

Internal academic work does not include internal qualifications [Page 15] (object type CQ), external qualifications [Page 14] (object type EQ), and external subjects [Page 12] (object type SU).
1.2.3.6.1 Creating/Maintaining Internal Qualifications

Use

Students acquire internal qualifications upon successful completion of modules or programs. When you create or maintain internal qualifications, you specify the modules or programs to which the internal qualifications belong.

Prerequisites

- You have created programs [Page 19] and modules [Page 87].
- Your system administrator has made required settings in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Qualifications.
- Your system administrator has created a grading scale for internal qualifications in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Scales.

Procedure

I. Creating an Internal Qualification

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Internal Qualification.
   The Edit Internal Qualification screen appears. The system uses the object manager [Page 26], which is a convenient user tool for internal qualification search and selection.
2. Enter the start date of the internal qualification you are creating.
   You can create a new internal qualification using an existing internal qualification as a template. To do so choose this internal qualification from the object manager selection area, and then choose (Use copy).
3. To create an internal qualification without using a template, choose (Create).
   The Create Internal Qualification: Data Screen appears.
4. Enter an abbreviation and a name for the internal qualification.
5. Enter the required data on the respective tab pages:

<table>
<thead>
<tr>
<th>Tab Page</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>General description of the internal qualification</td>
</tr>
<tr>
<td>Qualification Data</td>
<td>Special internal qualification data</td>
</tr>
<tr>
<td>Evaluation</td>
<td>The scale used to rate the internal qualification</td>
</tr>
<tr>
<td>Disciplines</td>
<td>Field of study in which the student earned the qualification</td>
</tr>
<tr>
<td>Relationships</td>
<td>Relationships that link the internal qualification with programs and modules</td>
</tr>
</tbody>
</table>
   To link an internal qualification with programs or modules, choose (Create).
6. Choose (Save).
II. Maintaining an Internal Qualification

1. From the SAP menu, choose **Student Lifecycle Management → Academic Structure (Curriculum) → Study Planning → Internal Qualification**.
2. Select the internal qualification you want to edit using the object manager [Page 26].
3. To change the selected internal qualification, choose *(Change)*. The **Maintain object** screen appears.
4. Maintain the required infotypes of the internal qualification, and save the changes in each infotype by choosing *(Save)*.

1.2.3.6.2 External Academic Structures

In **Student Lifecycle Management**, you can enter the academic achievements that students accomplished at other schools or universities in student master data.

These schools or universities are referred to as **external organizations** [Page 107] in **Student Lifecycle Management**. The subjects offered by external organizations are referred to as **external subjects** [Page 12]. The qualifications that students have acquired at external organizations are referred to as **external qualifications** [Page 14].

You can enter the measure of academic performance in an external subject (grade or credits) and the external qualification awarded to a student in the master data infotype **External Transcripts** (1719). For more information, see **Maintenance of External Transcripts** [Page 53].

You can enter the results of tests that students have taken at external organizations in the infotype **External Test Results** (1721). For more information, see **Maintenance of External Test Results** [Page 54].

1.2.3.6.3 Creating Academic Scales

Use

You need academic scales when:

- Setting up and grading modules
- Setting up programs
- Setting up average grades
- Setting up external subjects and external organizations
- Creating external academic achievements for a student

You set up academic scales in Customizing for **Student Lifecycle Management** in the section **Student Lifecycle Management Master Data → Academic Scales → Set Up Academic Scales**.

You can manage different types of academic scales in Student Lifecycle Management. You can also convert between scales. In this way, you can use different scales at your university and switch between scales without losing data.

You can define different types of academic scales, for example, quality scales (A, B, C...) or quantity scales with stepwise increments (1.0; 1.1; 1.2...5.9; 6.0). Each scale you create is converted to a standard scale and stored in the system. The system converts each grade on a user-defined (customer) scale to a value on the internal standard scale, and stores this value. On the standard scale, you can define a universal threshold value which denotes the “just passed” value that applies to all customer scales. This enables you to define that grades below a particular value are failures without explicitly specifying this in the customer scale.
Prerequisites

You must maintain the following data when creating a scale:

- Scale type (quality scale, quantity scale, etc.)
- Highest and lowest values, and the increment for quantity scales
- Values for quality scales
- Description of scale sections and/or values (for example, 1.0 – 1.49 = Excellent; 1.5 – 2.49 = Good, etc.)
- Base value for mapping the customer scale to the standard scale

For more information, see Student Lifecycle Management Master Data → Academic Scales → Set Up Academic Scales in Customizing for Student Lifecycle Management.

Base Value of Scales

You need the base value when you set up customer scales in Customizing for Student Lifecycle Management. The base value of a scale takes into account the universal threshold value of the standard scale. If the calculated base value is negative, you have to increase the universal threshold value on the standard scale, and then create all scales again using the new (positive) base value. You set up the universal threshold value of the standard scale in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Master Data → Academic Scales → Define Universal Values and Scales.

![Note]

Calculate the base value for all customer scales manually before defining the universal threshold value of the standard scale in Customizing to avoid obtaining negative values.

Calculation of the Base Value

**Given Values:**

- $a$ = Highest value on the customer scale (numeric)
- $b$ = Lowest value on the customer scale (numeric)
- $c$ = Lowest value on the customer scale which corresponds to the lowest passing grade; this value must have at least one decimal place

You must always enter the lower threshold value as a decimal number with one decimal place even if you use a customer scale without decimal places (for example 1, 2, 3...). Enter the decimal number that can be rounded to the lowest scale value for "just passed". (Let us assume the lowest scale value for "just passed" is 1. The lowest threshold value for "just passed" therefore has to be 0.5 because 0.5 is 1 when rounded).

- $d$ = Threshold value defined on the standard scale (see Customizing)

**Required Value:**

$e$ = Base value of standard scale

**Prerequisite:**

$a – d$ is not equal to zero.

**Formula:**

$$e = \frac{(d \times (a – b) + 100.000 \times (b – c))}{(a – c)}$$
**Base Value Concept**

The standard scale contains a universal threshold value for a “just-passed” grade. Every standard scale value which is equal to or higher than the universal threshold value denotes a passing grade. Every standard scale value which is lower than the universal threshold value denotes a failing grade. This comparison with the standard scale is based on the idea of standard achievements. For example if a student’s grade is 60 percent on the standard scale, (s)he passed irrespective of which customer scale is used for evaluation.

As the system maps every grade on the customer scale to the standard scale, the customer scale must be adjusted to the standard scale. This is done by mapping the universal threshold value on the standard scale to the threshold value of the customer scale in Customizing (for example, universal threshold value = 50.000, threshold value of customer scale = 4,9). The system uses a base value which raises the customer scale values to bring the universal threshold value of the standard scale and the threshold value on the customer scale up to the same level.

### Mapping Customers Scales to the Internal Standard Scale

<table>
<thead>
<tr>
<th>Scale 0001</th>
<th>Base value</th>
<th>59.5</th>
</tr>
</thead>
<tbody>
<tr>
<td>(%)</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>quantity scale</td>
<td>60.000,00</td>
<td></td>
</tr>
<tr>
<td>Internal standard scale</td>
<td>0</td>
<td>100.000,00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scale 0002</th>
<th>Base value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(A/B/C/D/E = 4/3/2/1/0)</td>
<td>D-</td>
</tr>
<tr>
<td>quality scale</td>
<td>E</td>
</tr>
<tr>
<td></td>
<td>A+</td>
</tr>
</tbody>
</table>
### Examples

#### Table 1

<table>
<thead>
<tr>
<th>Scale</th>
<th>Standard scale</th>
<th>Scale 1</th>
<th>Scale 2</th>
<th>Scale 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scale increment</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Highest value on customer scale (a)</td>
<td>100000</td>
<td>100</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Lowest value on customer scale (a)</td>
<td>0</td>
<td>1</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Lowest value which counts as “just passed”(c)</td>
<td>(d = 50000) 49,5</td>
<td>4,5</td>
<td>0,5</td>
<td></td>
</tr>
<tr>
<td>Required base value</td>
<td>0</td>
<td>1980,19802</td>
<td>28571,42857</td>
<td>42857,14286</td>
</tr>
<tr>
<td>Remarks</td>
<td></td>
<td>50 = Just passed</td>
<td>4 = Just passed</td>
<td>1 = Just passed</td>
</tr>
</tbody>
</table>

#### Table 2

<table>
<thead>
<tr>
<th>Scale</th>
<th>Standard scale</th>
<th>Scale 4</th>
<th>Scale 5</th>
<th>Scale 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scale increment</td>
<td></td>
<td>1</td>
<td>1,0 / 1,3 / 1,7 / 2,0...</td>
<td>1</td>
</tr>
<tr>
<td>Highest value on customer scale (a)</td>
<td>100000</td>
<td>1</td>
<td>1</td>
<td>800</td>
</tr>
<tr>
<td>Lowest value on customer scale (b)</td>
<td>0</td>
<td>5</td>
<td>5</td>
<td>200</td>
</tr>
<tr>
<td>Lowest value which counts as “just passed”(c)</td>
<td>(d = 50000) 4,5</td>
<td>4,2</td>
<td>420</td>
<td></td>
</tr>
<tr>
<td>Required base value</td>
<td>0</td>
<td>42857,14286</td>
<td>37500</td>
<td>21052,63158</td>
</tr>
<tr>
<td>Remarks</td>
<td></td>
<td>4 = Just passed</td>
<td>4 = Just passed</td>
<td>4 = Next lowest value</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.3 = Next lowest value</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.2 becomes 4.0 when rounded, and therefore counts as “just passed”. 4.3 denotes a failure on the scale; 4.2 therefore is the required value.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.2.3.6.4 Rules

The rules in *Student Lifecycle Management* are used for formal checks, period and deadline checks, and checks based on the academic structure.

Each application area has its own set of rules:

- **Prerequisites/Conditions**: These rules are checked when a student applies for admission and registration, selects academic specializations, and books modules.
- **Progression monitoring**: These rules determine whether the academic performance of a student meets the requirements set by the university.

Applications, such as module booking, have specific callup points at which the system evaluates the predefined rules (for example, the *module booking (single) callup point* is processed when a student books a module).

The following table provides an overview of the callup points used in *Student Lifecycle Management* functions. This table lists only the generic term for a group of related callup points; for example *module booking* refers to all callup points related to module booking. The number of callup points within a particular group is given in brackets next to the generic term. For example, the generic term *module booking (3)* comprises the three callup points *module booking (general)*, *module booking (set)*, and *module booking (single)*.

<table>
<thead>
<tr>
<th>Function</th>
<th>Generic Term with (Number) of Callup Points</th>
<th>Type of Callup Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission</td>
<td>Admission (2)</td>
<td>Academic and non-academic (see explanation below)</td>
</tr>
<tr>
<td>Registration</td>
<td>Registration (4)</td>
<td>Academic and non-academic</td>
</tr>
<tr>
<td>Re-registration</td>
<td>Re-registration (4)</td>
<td>Academic and non-academic</td>
</tr>
<tr>
<td>Leave of absence</td>
<td>Leave of absence (4)</td>
<td>Academic and non-academic</td>
</tr>
<tr>
<td>De-registration</td>
<td>De-registration (2)</td>
<td>Only non-academic</td>
</tr>
<tr>
<td>Academic specialization booking</td>
<td>Academic specialization booking (3)</td>
<td>Academic</td>
</tr>
<tr>
<td>Module booking</td>
<td>Module booking (3)</td>
<td>Academic</td>
</tr>
<tr>
<td>Progression</td>
<td>Progression (1)</td>
<td>Academic</td>
</tr>
</tbody>
</table>

Callup points are distinguished by their type, which can be academic and/or non-academic:

- **Academic callup points** are used to link rule containers [Page 116], which are the central objects within the rules, with objects of the academic structure, such as programs [Page 19] or modules [Page 87]. The rule containers are then valid for the object of the academic structure to which they are assigned, and for all subordinate objects linked to this object.

In the case of **non-academic callup points**, the system makes no distinction between the different objects of the academic structure. Instead, it evaluates all the rule containers assigned to these non-academic callup points. You assign rule containers to non-academic callup points in Customizing for *Student Lifecycle Management* in the section *Rules → Rule Containers → Assign Rule Containers to Callup Points*. The rules are based on a three-level concept. At the top level are the rule containers. Rule containers are objects that are either linked with other objects of the academic structure or are assigned directly to specific *Student Lifecycle Management* applications in Customizing. The rule containers contain rule modules. Rule modules contain one or more rule elements, and are modular and reusable. The rule elements are validations or substitutions that belong to the application *Validations, Substitutions, Rules (VSR)*.
For more information about rules, see Rules in the Student Lifecycle Management Implementation Guide. We recommend you also read the documentation in the SAP Library in the section Accounting → Financial Accounting → Special Purpose Ledger → Validations, Substitutions, and Rules.

Examples

One rule container can contain the checks that apply for admission of domestic students. Another can contain the checks for admission of international students.

A rule module can contain the checks which, for example, determine whether a student fulfils the Mathematics prerequisites.

A single rule element then checks whether the student has passed the Mathematics entrance test.

See also:

Maintaining Validations [Page 112]
Maintaining Substitutions [Page 113]
Setting Up Rule Modules [Page 114]
Rule Container [Page 116]
Maintaining Rule Containers [Page 118]
Rules Overview [Page 118]

1.2.3.6.4.1 Maintaining Validations

Use

You use validations to evaluate the data of Student Lifecycle Management applications based on a certain set of rules. For example, you can determine whether a student fulfils the prerequisites for entrance to a specific program. The system transfers the data in the Student Lifecycle Management applications to rule evaluation at specific program locations, or callup points. During rule evaluation, the system determines which rule containers contain the rule modules with the relevant validations.

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Rules → Rule Elements → Edit Validation.

2. Expand the Student Lifecycle Management hierarchy to the desired application area and select this area.

3. Select the validation or validation step you want to edit.

4. To create a new validation, choose Validation.

   a. Enter a name and description for the validation.
   b. Insert the required validation steps.
   c. For each validation step, enter a prerequisite, check and, validation message.

      The validation message is output if the prerequisite is fulfilled but the check is not successful.

5. Choose (Save).
1. Example
You want to create a validation which checks whether a student is pursuing degree studies when the student books a module. Your university offers certain modules which may only be booked by regular students pursuing degree studies. This validation might contain the following check:

**Prerequisite:**
(You do not require an explicit prerequisite.)

**Check:**
Registration type <> '02' (entry in the column *Short description*; you can access this entry from the menu by choosing *Settings* → *Short description*).

or:
PIQRULESTSC-ENRCATEG <> '02' (entry in the column *Technical name*; you can access this entry from the menu by choosing *Settings* → *Technical name*).

(02 corresponds to the registration status occasional student, for example.)
You can also use the indicator DEGREESEEK in the structure PIQRULESTSC to determine if a student is pursuing degree studies.

2. Example
The following is an example of a validation which checks whether a part-time student has booked the required minimum number of modules per session (6 credits minimum) and has not exceeded the maximum number of module bookings (10 credits maximum):

**Prerequisite:**
PIQRULESTSC-PARTT = 'X'

**Check:**
SUM ( PIQRULEMASTERS-SM_506_CPATTEMP ) where 7OPENSMBOOK >= '6.00000'
AND SUM ( PIQRULEMASTERS-SM_506_CPATTEMP ) where 7OPENSMBOOK <= '10.00000' (entry in the column *Technical name*)

**(Logical) rule:**
7OPENSMBOOK (open module bookings)

**Rule contents:**
PIQRULEMASTERS-SM_506_SMSTATUS = ' ' OR
PIQRULEMASTERS-SM_506_SMSTATUS = '01'

Instead of the field PIQRULESTSC-PARTT, you can use the field FT_PT_STATUS of the structure PIQRULESTUDENT provided this field is available for the student.

1.2.3.6.4.2 Maintaining Substitutions

**Use**
You use substitutions to replace the data that is available to *Student Lifecycle Management* rules with other data. The system can therefore set the progression status based on a student’s average grades, for example.

In addition, user exits enable you to read the data which is required for validation and make it available for the rule check. The system can therefore determine which modules a student has completed using user exit UCP4 (replace modules of students), for example.

The replaced data remains valid only during rule evaluation and is not written to the *Student Lifecycle Management* applications. (The progression status is an exception.)
The standard Student Lifecycle Management system contains the user exit programs listed below. These user exits can be used in substitutions. Substitutions might, for example, consist of one step and use substitutable fields of the type Exit only. You can use the following user exit programs as exits and create the required substitutions:

<table>
<thead>
<tr>
<th>Exit</th>
<th>Substitution</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCP1</td>
<td>Replace average grades for admission</td>
</tr>
<tr>
<td>UCP2</td>
<td>Replace academic calendars</td>
</tr>
<tr>
<td>UCP3</td>
<td>Replace business events of students</td>
</tr>
<tr>
<td>UCP4</td>
<td>Replace modules of students</td>
</tr>
<tr>
<td>UCP5</td>
<td>Replace qualifications of students</td>
</tr>
<tr>
<td>UCP6</td>
<td>Replace additional data of students</td>
</tr>
<tr>
<td>UCP7</td>
<td>Replace test results and external subjects of students</td>
</tr>
</tbody>
</table>

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Curriculum → Study Planning → Rules → Rule Elements → Substitutions.
2. Expand the Student Lifecycle Management hierarchy to the desired application area and select this area.
3. Select the substitution or substitution step you want to edit.
4. To create a new substitution, choose, Substitution.
   a. Enter a name and description for the substitution.
   b. Insert the required substitution steps.
   c. Enter the field you want to use for the substitution.
   d. Enter the prerequisite and specify how the substitution is to be performed.
5. Choose (Save).

Example

In the Progression application, you can use a substitution to set a student’s subsequent progression status. The system sets the subsequent progression status to 002 if the current progression status is 002 and the student has a value of at least 2.0 and 30.0 in the average grades1 and 2 respectively. This scenario describes a student with good grades.

Prerequisite:

PIQRULEPROGR-A_PROGSTAT = '002' AND
PIQRULEPROGR-SINDEX_1 > = '2.00' AND
PIQRULEPROGR-SINDEX_2 >= '30.00' (entry in the column Technical name; you can access this entry from the menu by choosing Settings → Technical name).

Substitution:

The subsequent progression status (PIQRULEPROGR-N_PROGSTAT) is replaced by the constant value 2.

1.2.3.6.4.3 Setting Up Rule Modules

Use

In rule modules you combine rule elements, i.e. group validations [Page 112] and substitutions [Page 113]. You can assign the rules modules to rule containers.
Prerequisites
The required validations and substitutions are available in the system.

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Curriculum → Study Planning → Rules → Rule Modules.
   When setting up a rule module, you must perform these three steps:
   ○ Step 1: Define the rule module
   ○ Step 2: Describe the rule module
   ○ Step 3: Build the rule module

2. Define the rule module.
   You define a rule module by entering a numeric key and descriptive text. You must create a new entry for each rule module.
   a. In the top node Rule Modules, choose New entries.
   b. Enter a numeric key and a descriptive text for each rule module.
   c. Choose Save (Save).

3. Describe the rule module.
   For each rule module, enter a description that explains its content and function.
   a. Select the rule module you want to describe, and choose the node Rule Module Description by double clicking it.
   b. Choose New entries.
   c. Enter a description for the rule module.
   d. Choose Save (Save).

4. Build the rule module.
   In this step, you assign rule elements to the rule modules. The system processes these rule elements when the rule module is called. If the rule elements are validations, you can combine them with the operators AND and OR.
   a. Select the rule module you want to build, and choose the node Rule Module Construction by double clicking it.
   b. Assign rule elements to the rule module. You can use operators to combine the rule elements.
      An example of how to set up a rule module is given in the following.
   c. Choose Save (Save).

Example
When a student applies for admission, you want the system to check whether the student fulfils the set prerequisites, which are checked by means of rule elements:

- Prerequisite knowledge in Algebra (rule element ZU_MA1)
- Prerequisite knowledge in Geometry (rule element ZU_MA2)
- Prerequisite knowledge in Mathematics based on a Mathematics test (rule element ZU_MAT)

The rule elements are all validations. To map the prerequisites in the system, you combine the following entries:
Rule module for admission

<table>
<thead>
<tr>
<th>Parenthesis</th>
<th>Rule type</th>
<th>Rule element</th>
<th>Parenthesis</th>
<th>Combination</th>
<th>Sort sequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>(</td>
<td>Validation</td>
<td>ZU_MA1</td>
<td></td>
<td>AND</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>Validation</td>
<td>ZU_MA2</td>
<td>)</td>
<td>OR</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>Validation</td>
<td>ZU_MAT</td>
<td></td>
<td></td>
<td>30</td>
</tr>
</tbody>
</table>

In the first two steps, the system checks if the student has the prerequisite knowledge in Algebra and Geometry. You map this check in the system by placing the two rule elements in parentheses and combining them with the operator AND. Alternatively, the system checks if the student has fulfilled the Mathematics prerequisites by achieving a pass in the Mathematics test. You map this check in the system by combining the first two steps and the third step with the operator OR.

### 1.2.3.6.4.4 Rule Container

**Definition**

A container for rule modules.

**Use**

Applications can be linked directly to rule containers by means of non-academic callup points (in Customizing for Student Lifecycle Management, see Rules → Rule Containers → Assign Rule Containers to Callup Points). You can also link rule containers with objects of the academic structure, such as organizational units and programs, by means of academic callup points. Student Lifecycle Management applications, such as module booking, evaluate these links.

A rule container contains rule modules which, in turn, contain rule elements. A rule element can be a validation or substitution.

You can access the functions for creating and maintaining rule containers from the Student Lifecycle Management menu by choosing Curriculum → Study Planning → Rules → Rule Container. You use the object manager [Page 26] when you create and maintain rule containers. The object manager is a convenient user tool which helps you find and select rule containers.

**Structure**

When you create a new rule container or maintain an existing one, you create or change the following infotypes for the rule container:

- Object (1000)
- Relationships (1001)
- Description (1002)
- Rule Modules (1747)
Graphical Display of Rule Container Structure:

Example of Rule Container Structure:
See also:
Maintaining Rule Containers [Page 118]

1.2.3.6.4.5 Maintaining Rule Containers

Use
In rule containers, you can combine rule modules. You can assign rule containers to a program or module if you want the system to check the rules that apply to this program or module. You can also assign rule containers to a program or module from the program catalog and module catalog respectively.

Prerequisites
You have defined the rule modules you want to assign to rule containers.

Procedure
1. To create a new rule container:
   a. Choose Create.
      Check if the validity start date is correct.
   b. Enter an abbreviation and a name for the rule container.
   c. Enter a general description of the rule container and assign the rule modules to it.
   d. Choose Save.
   e. To link the rule container with other objects, call the rule container in the change mode (following procedure).
2. To change an existing rule container:
   a. Choose an existing rule container using the search function.
   b. Choose Change.
   c. Edit the rule container.
      To do so, select the infotype you want to change and choose Change.
   d. Save your changes.

1.2.3.6.4.6 Rules Overview

Use
The rules overview provides information on which rule containers (object RC) are linked to the academic structure and on the structure of these rule containers. Rule containers can be linked directly to the academic structure or inherited from higher-level objects of the academic structure.

Features
The system creates a tree structure for the rules overview which shows the relationships between the rules (inheritance or direct linkage).
You can choose between two different views:
- Structure View of Rules Overview
- Process View of Rules Overview
The structure view and process view each also have different view variants.
1.2.3.6.4.6.1 Structure View of Rules Overview

Use

The structure view of the rules overview enables you to determine which rules are assigned to a specific object of the academic structure (for example, to a program or business event package).

The structure view has three variants which you can access from the Goto menu:

- Graphical and text view (default setting)
- Graphical view only
- Text view only

Features

The system creates a tree structure which shows the relationships between the rules (inheritance or direct linkage). Depending on which variant you choose, the system generates a graphical display or summary of the assigned rules, or both.

To generate the structure view of the rules overview, enter the following parameters:

- A key date for the evaluation
- One of the following objects of the academic structure
  - Business event package [Page 23] (SE)
  - Module [Page 87] (SM)
  - Module group [Page 88] (CG)
  - Program [Page 19] (SC)
  - Organizational unit [Page 17] (O)

- One or more callup points

  If the object within the academic structure is a program (SC), you can also specify the stage.

The callup point and stage are parameters which link rule containers [Page 116] with the academic structure.

See also:

Calling the Structure View of the Rules Overview [Page 119]

1.2.3.6.4.6.2 Calling the Structure View of the Rules Overview

Procedure

1. From the SAP menu, choose Student Lifecycle Management → Academic Structure (Curriculum) → Rules → Rules Overview → Structure View.

   The Overview of CM Rules (Structure View) screen appears.

2. If you want to display only the graphical view or only the text view, choose Goto and then the desired view variant. The default setting is Graphical and text view.

3. Enter a key date.

4. Choose an object type and enter the academic object.

   You can find the academic object using Request object.

5. Choose Callup points, and select one or more callup points.

   You can also choose Select all.

6. Choose Read linked rule containers. The system reads the rule containers assigned to the specified object.
Result

The system displays the rules assigned to the specified object of the academic structure.

- You can display or hide certain fields of the graphical view, such as the object key, using Field selection. You can also completely expand or compress the structure.
- In the summary, you can display and hide the object IDs and the rule module descriptions.

1.2.3.6.4.6.3 Process View of Rules Overview

Use

The process view of the rules overview enables you to determine which rule containers [Page 116] are linked with the objects of the academic structure. With this function, you can display a complete overview of the rule containers used in the system. You can also display the rules that are used at specific callup points, that is, in specific processes. Moreover, you can use this function to generate a where-used-list for rule containers, rule modules [Page 114], and rule elements (validations [Page 112] and substitutions [Page 113]).

The process view has four view variants which you can access from the Goto menu:

- Graphical view only
- Graphical and text view (default setting)
- View of one process
- View of several processes

The Graphical view only and Graphical and text view variants are identical, except that the Graphical view only variant does not contain a summary of the rules. Both view variants offer a general overview of the objects in the academic structure and of the rule containers assigned to non-academic callup points.

In the View of one process (transaction PIQRULEWB_RC_TP), you can specify the callup point for which the system should generate an overview. The View of several processes (transaction PIQRULEWB_RC_TPS) is identical to the aforementioned variant, except that you can specify one or more callup points here. If you use one of these two view variants regularly, you can insert the associated transaction in your user menu or add it to your favorites.

If you want to know which admission requirements are defined in Student Lifecycle Management and which objects these depend on, choose the view variant View of one process. Enter admission as the callup point.

Features

The system creates a tree structure which shows how the rules are interrelated (inheritance, or direct assignment of rule containers).

Input Parameters for the Process View of the Rules Overview

You can enter the following parameters:

- A key date for the evaluation
- Depending on the chosen view variant, one or more academic callup point(s), or all of them

The callup point is a parameter which links rule containers [Page 116] with the academic structure.
The display depends on the view variant:

<table>
<thead>
<tr>
<th>View variant</th>
<th>Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graphical and text view</td>
<td>• Overview showing which rule containers are linked to which objects of the academic structure&lt;br&gt;• You can restrict this display to a specific callup point. No entry (blank) means all callup points&lt;br&gt;• Rule display (rule container view)&lt;br&gt;• Text display&lt;br&gt;• Overview of rule containers at non-academic callup points</td>
</tr>
<tr>
<td>Graphical view only</td>
<td>Like the general overview without the text view</td>
</tr>
<tr>
<td>View of one process</td>
<td>Like the general overview with preselection of one callup point and without an overview of the rule containers assigned to non-academic callup points</td>
</tr>
<tr>
<td>View of several processes</td>
<td>Like the general overview with preselection of one or more callup points and without an overview of the rule containers assigned to non-academic callup points</td>
</tr>
</tbody>
</table>

**Hierarchy Display**

The hierarchy display can be set up in different ways. You can choose the top and bottom hierarchy levels (Access via... to...), and the display direction.

The top and bottom hierarchy levels can be:

- Objects of the academic structure
- Rule containers
- Rule modules
- Rule elements (validations, substitutions)
- Boolean classes

The display direction can be top down (from the objects of the academic structure to the Boolean classes), or bottom up (from the Boolean classes to the objects of the academic structure). In the display, you can show or hide the callup points or the stage as additional data.

When you change the display, you must refresh the tree structure using 📜. However, when you display or hide fields using Field selection, the display is refreshed automatically.

**Where-Used-List Display**

You can display a where-used-list for rule containers, rule modules, and rule elements either for all callup points or for selected processes, that is, for one or more callup points.
You want to know which rule containers use a particular rule module. You set up a tree structure as follows:

- You choose the access level **rule modules**.
- You choose **bottom up** as the display direction.
- You choose **rule containers** as the top hierarchy level of the tree structure.

**See also:**

Calling the Process View of the Rules Overview [Page 122]

### 1.2.3.6.4.6.4 Calling the Process View of the Rules Overview

**Procedure**

1. From the SAP menu, choose **Student Lifecycle Management → Academic Structure (Curriculum) → Rules → Rules Overview → Process View**.

   The **Overview of CM Rules (Process View)** screen appears.

2. Choose **Goto**, and select the desired view variant.

   The default setting is **Graphical and text view**. For more information on view variants, see **Process View of Rules Overview** [Page 120].

3. Enter a **key date**.

4. Depending on which view variant you have selected, choose one, several, or all academic callup point(s).

5. Choose **Read linked rule containers**.

   The system reads the rule containers assigned to the specified callup points.

**Result**

The system displays an overview of the rules for the selected callup points (in the general view, it also shows the rule containers assigned to non-academic callup points).

- You can change the tree structure by choosing the desired **Display** options and then **`.** For more information on the tree structure, see **Process View of Rules Overview** [Page 120].

- You can display or hide certain fields of the hierarchy display, such as the object **key**, using **Field selection**. You can also completely expand or compress the structure.

- In the summary, you can display and hide the **object IDs** and the **rule module descriptions**.

### 1.2.3.6.4.7 Overriding Message Logs

**Use**

Various processes in **Student Lifecycle Management** contain callup points at which the system performs rule checks. The system collects the messages it outputs during performance of these checks in a message log. If the message log contains only warning messages (message type **W**), information messages (message type **I**), or success messages (message type **S**), you can override or “ignore” the messages.

The system saves the original message log so that you can trace and subsequently check the override. You define the callup points at which the system should save the original message log in Customizing for **Student Lifecycle Management**. For more information, see **Message Log Tracking in Case of Overrides** [Page 124].

You are not permitted to override error messages (message type **E**). However, authorized users can override certain rule check messages and change the message type of these messages. For more information, see **Definition of Message Type Overrides** [Page 123].
Activities

The system displays the message log in a dialog box. You have the following options:

- You can override the message log:
  
  An overridable message log contains the required icons in the Overridable column. It also contains the New entry/correction pushbutton.
  
  - If you want to override the message log, choose 🟢 (Continue) or 🟥 (Cancel) in the dialog box.
    
    You can create a note for each message log you override. The system then performs the desired activity.
  
  When you choose 🟥 (Cancel), the system does not cancel the activity. It overrides the message log which means it performs the activity. This pushbutton and the 🟢 (Continue) pushbutton apply to the dialog box and not to the actual activity.
  
  - If you do not want to override the message log, choose New entry/Correction. The system then does not perform the activity.
    
    You can configure the system so that the number of messages are reduced the next time a check is performed.

- You cannot override the message log:

  When you have viewed the messages, choose 🟢 (Continue) or 🟥 (Cancel) in the dialog box. The system then does not perform the activity.

The message log is based on Application Log functions. For more information on this topic, see Application Log – Guideline for End Users.

1.2.3.6.4.7.1 Definition of Message Type Overrides

Use

You can override the message log generated for a rule check if this log only contains messages of the type W, I, or S. You cannot override message logs that contain an error message (message type E). However, the system does allow you to override rule check messages and change the message type from E to W if you have the required authorization.

An override can be applied to the following messages

- Messages for validations specified in the rules
- Messages for firmly implemented checks
- Messages for checks performed by business add-ins (BAdI)
- Messages for other checks

Prerequisites

The SAP standard messages that users are allowed to override are predefined:

- Table T7PIQT100SA (Message Classes for Overridable Messages) contains the message classes that users are allowed to override.
- Table T7PIQT100S (Overridable Messages with Associated Message Class) contains the messages that users are allowed to override in each message class. There, you also define which new message type users are allowed to set for a message.
You maintain both of these tables in view cluster VC_T7PIQMSGGOVR.

In this view cluster, you define the overrides for standard messages as well as for customer messages (messages for validations contained in the rules and for customer BAdI implementations).

**Activities**

You can set the override for each individual message in the rule container object of the infotype Message Control (1749). In this infotype, authorized users can change the message type, for example, from an error message (E type) to a warning message (W type).

**1.2.3.6.4.7.2 Message Log Tracking in Case of Overrides**

**Use**

The system enables you to track and subsequently check the override set for a message log at a specific callup point by allowing you to store the original message log.

**Prerequisites**

The system saves the original message log only if (at least) one of its callup points has an active "save" flag and the message log was overridden.

**Customizing**

The "save" flag is set for the callup point.

Your system administrator makes this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → General Settings → Rules → Set Up Logging of Messages.

**Features**

- When you override a message log, you can create a note and specify the reasons for the override.
- You can access the original message logs from the student file.
- The system saves message logs according to the callup point. However, because the system can only store the message log in its entirety, a message log may also contain messages that were output at other than the specified callup point.
- The system sets a link to the message logs it saves in the study and student objects of the infotype Rule Check Results (1748). You can use this link to access the message log. The system sets a separate link for each callup point with an active "save" flag even if other links already exist for the message log.

**Example**

When you book modules, the system performs checks at the following callup points:

- Callup point 0001 (Module booking (general))
- Callup point 0002 (Module booking (set))
- Callup point 0003 (Module booking (single))

These can be firmly implemented checks and VSR rule checks.

Callup point 0002 contains checks which fail if the module combination is not suitable. You want the system to save the original message log if it contains messages for callup point 0002 so you set the "save" flag for this callup point in Customizing for Student Lifecycle Management.
Example 1: If you override a message log that contains messages for callup points 0001 and 0003, the system does not save the original message log. Reason: The "save" flag is not set for callup points 0001 and 0003.

Example 2: If you override a message log that contains messages for callup point 0002, the system saves the original message log. For each override, you can create a note with up to 256 characters. The system saves this note in the application log header. If the message log also contains messages for callup points 0001 and/or 0003, the system also saves these. Reason: The system always stores a message log in its entirety.

1.2.3.6.4.7.3 Displaying Original Message Logs

Use

The system allows you to save the original message log so that you can trace and subsequently check the override set for a message log.

Prerequisites

The “save” flag is set for callup points in the message log. Your system administrator makes this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → General Settings → Rules → Set Up Logging of Messages.

If you set the “save” flag for a particular callup point, the system saves all message logs that contain this callup point and were overridden.

Procedure

1. Choose a student in the Student File [Page 38].
2. Choose (Message logs) or Student → Message logs.
   The system displays the message logs which were output for the student and his/her programs and contain callup points with an active “save” flag.
3. Double click a message log to display the original message log and corresponding note.

   The system sets a link to original message logs in the student (ST) and study (CS) objects of the Rule Check Results infotype (1748). You can access the message log using this link or from the student file.

1.2.3.6.5 Key Figure

Use

You use key figures in the following Student Lifecycle Management applications:

- Module appraisal
  When you create an appraisal for modules, you use key figures to calculate the grades within an appraisal template.
  You can assign a key figure to each appraisal element you insert in the appraisal template. You can also define the default key figure the system should use for an appraisal element which has not been assigned a key figure.

- Audit [Page 143]
  In audits, you use key figures to map auxiliary conditions. You assign these auxiliary conditions to requirements in a requirement catalog. The system evaluates the auxiliary conditions when you perform audit runs.

Key figures can be grades or credits, for example.
Integration

Performance indices are special key figures which are based on module bookings. You can therefore use a performance index as a reference when you define a key figure.

You need academic scales [Page 107] for key figures.

Prerequisites

You have set up the required academic scales. You make this setting in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Academic Scales.

You make the settings for key figures in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Key Figures.

You make the settings you need to be able to use key figures in module appraisals in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Appraisal in the following IMG activities:

- Define Appraisal Templates
- Define Default Key Figure

Features

Key Figures Without Reference to a Performance Index

A key figure that does not refer to a performance index can contain the following parameters:

- Calculation method
- Calculation scale (academic scale)
- Result scale (academic scale)
- Output semantics of the key figure
- Allowed input semantics of the key figure

When you calculate key figures, you require input values which comply with specific semantics rules. For example, if you want to calculate an average grade as a key figure, you must use grades as the input parameter. The output of this key figure is also a grade. Therefore, you must define the input and output semantics for each key figure.

The input and output semantics define the structure of the return value, which is composed of the following elements:

- Grade (with a scale)
- Value (with a unit)
- Both

Key Figures With Reference to a Performance Index

Performance indices are key figures as well. However, they are special key figures which are calculated on the basis of academic work.

You do not have to create key figures for existing performance indices. You only have to create the key figures you need for the above applications.

The calculation of key figures for an auxiliary condition, such as number of credits or average grade, is based on academic work. In this case, you use a key figure that refers to a performance index.
1.2.4 Academic Records

Use
You can use the Academic Records application to control your university’s assessment process from start to finish. With Academic Records you can:

- Edit assessments [Page 127] (object type CE)
  You can create assessments for a module or program (or a program stage, if required).

- Edit scheduled assessments [Page 127] for the assessments you have created

- Open, monitor and cancel assessment processes based on module bookings [Page 129] and assessment processes based on programs [Page 131]
  When you open an assessment process for a student, you register this student for an assessment.

Integration
Academic Records uses the following functions:

- Academic sessions to map assessment periods, and period groups to define assessment periods (see also Scheduled Assessment [Page 127])

- Functions which persons must exercise so that exams can be conducted

- Selection methods which enable you to choose students when you open assessment processes

- Customer and system status for status management in the assessment process

Prerequisites
You make the settings for academic records in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Academic Records.

1.2.4.1 Scheduled Assessment

Use
You can create one or more scheduled assessments for an assessment [Page 127] in each academic year and assessment period. You need scheduled assessments for assessment processes [Page 129]. When you open an assessment process for one or more students, you can enter the number of the scheduled assessment you want to use.

Integration
In the system, the assessment periods are academic sessions.

- If your university’s assessment periods are identical to your (general) academic sessions, you can use these (general) academic sessions in the Academic Records application.

- If your assessment periods do not coincide with the (general) academic sessions, you have to define separate assessment periods for Academic Records. The system lists these assessment periods in the input help it offers when you edit scheduled assessments only if you have created a separate period group for them, and defined this as the period group for Academic Records in Customizing for Student Lifecycle Management.

In the sessions of offering record for the assessment (assessment object in infotype 1739), you define the academic years and assessment periods in which the assessment is generally conducted.

You can create a concrete scheduled assessment only for the sessions of offering defined for an assessment. You define the sessions of offering for an assessment in the Edit Assessments dialog (see below for menu path) by choosing with the quick info text Sess.of Offering.
Prerequisites

Before you can create scheduled assessments for an assessment, you must create assessments for the modules and programs in question.

Features

When you edit scheduled assessments, you will notice the following differences between module and program assessments:

- Module assessments can be assigned concrete exams with the following data:
  - Exam date/time and location
  - Registration and withdrawal periods
  - Exam data
  - Exam profiles
    These contain default exam data which you can copy and change as required.
  - Affected persons and functions exercised
- Program assessment can be assigned registration and withdrawal periods, but not exams.

The scheduled assessment text which appears in the Edit Assessment Process dialog is composed of the default source code of the business add-in Generate Short Text for Scheduled Assessments. The system uses this default source code to generate the scheduled assessment short text by linking the following items of information, each separated by a colon:

- Assessment short text
- Academic year key
- Academic session key
- Scheduled assessment number

You can implement your own short text if you wish to. You create this implementation in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Academic Records → Assessments → Scheduled Assessments → BAdI: Generate Short Text for Scheduled Assessments.

Activities

You create scheduled assessments in the Edit Assessments dialog:

1. From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Edit Assessments.
2. First choose an object type and the assessment you wish to edit, or create an assessment for the selected object type.
3. Choose the academic year and assessment period.
4. Choose the processing type.
   - To display existing scheduled assessments, choose Sched.Assessmt.
   - To create scheduled assessments, choose with the quick info text Create Scheduled Assessment.
     The Scheduled Assessment Create screen appears.
   - To change scheduled assessments that already exist, choose with the quick info text Change Scheduled Assessment.
You can switch directly to the Edit Assessment Process screen by choosing with the quick info text Edit Assessment Process.

Generating Scheduled Assessments

If your scheduled assessments have identical attributes and only differ in their start and end times, you can create several scheduled assessments in one step.

1. Go to the Scheduled Assessment Create dialog as described above.
2. Choose Sched.Assessments with the quick info text Generate Scheduled Assessments.
3. Enter the attributes you want to generate, in particular the exam duration of each assessment, the maximum number of scheduled assessments, and the number of exams offered concurrently.
   The system displays the scheduled assessments it has generated.
5. Choose with the quick info text Save.

1.2.4.2 Assessment Process Based on Module Bookings

Purpose

When you register a student for an assessment, the system opens an assessment process. This assessment process either refers to an assessment [Page 127] or to a concrete scheduled assessment [Page 127]. The assessment process can either be based on module bookings or on programs and their stages [Page 131]. This document describes the assessment process based on module bookings.

Two statuses are related to an assessment process, a system status and a freely definable customer status. If the assessment process refers to the completion of a module, the process is related to a module booking, and through this, to an appraisal or part appraisal.

Process Flow

You perform the assessment process as follows:

1. You create the assessments [Page 127] you require for your modules in the planning phase.
   You also create the scheduled assessments [Page 127] for each assessment. However, you do not have to create the scheduled assessments at this time if you do not wish to. You can create them later.
2. Students book the modules they wish to take via Self-Service, or an advisor books the modules for the students using the module booking dialog (see program content).
3. When the modules are booked, the system lists the students who will be included in the assessment process for the given module on the Expected Process tab page.
   To edit assessment processes, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Edit Assessment Process.
4. If you have not created any scheduled assessments yet, you must do so now.
   To edit assessment processes, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Edit Assessment Process. When you have selected an assessment for the module, you can edit the scheduled assessment that belongs to it. After you have created a scheduled assessment, you can go directly to assessment process editing by choosing with the quick info text Edit Assessment Process.
5. You open the assessment process for the students listed on the Expected Process tab page.
   To do so, select the students you wish to edit on the Edit Assessment Process screen, and choose with the quick info text Open Assessment Process.
   Assign a number to the scheduled assessment in the Asmt(Des.) field. You can also make the assignment and change it after you have opened the assessment process.
You can also open the assessment process for students who are not listed on this tab page. To do so, choose Open Asmt Process. In the dialog box which appears, you can open the assessment process for a specific scheduled assessment for students you choose individually or by means of a selection method.

The assessment process can also be opened via the module booking dialog. Here, the student or the student's advisor can book modules and the associated scheduled assessments, and open the assessment process. If you choose this process variant, scheduled assessments must be created before the modules are booked so that the student (or advisor) can choose the appropriate scheduled assessment when (s)he books the modules. From the module booking dialog, the student or advisor can go directly to assessment process editing by choosing Goto → Assessment Process.

6. After the exams have been conducted, module appraisal takes place. The responsible administrator performs appraisal by assigning grades to students. The system displays the grades that were assigned for each module in the following fields of the Edit Assessment Process dialog:
   ○ Grade
   ○ Grading scale
   ○ Appraisal status
   ○ Appraisal remark

You can display the appraisal details in the Edit Assessment Process dialog by choosing with the quick info text Display Appraisal, or you can switch directly to the appraisal dialog by choosing Goto → Appraisal Dialog.

7. When the student has completed the assessment, you close the assessment process.

8. You can do this from the Edit Scheduled Assessment screen by choosing with the quick info text Execute Activity, and then choosing the appropriate activity. This pushbutton contains the following activities:
   ○ Open process
   ○ Reopen process
   ○ Cancel process
   ○ Complete process successfully
   ○ Complete process unsuccessfully

You can only execute an activity if you have the required activity authorization.

**Repetition Attempts**

If a student does not pass the assessment, you can create a repetition attempt.

To do this, choose with the quick info text Create Repetition Attempt. The system only allows this if the current assessment process is closed, which means the system status is not Opened. Only one assessment process may be open for each student and assessment at a time.

You can only create repetition attempts of an exam in the same academic year. If a student did not pass the exam and wants to repeat it in a following year, the exam must be unsuccessfully completed. The student must book the module in a following year and register again for the exam.

This procedure can be automated using expected processes. There is a sample implementation available, that considers this situation and expects processes for a selected exam also when module bookings and exams are unsuccessfully completed in a previous year. This implementation marks the expected exams as
To Be Continued. When you open expected processes marked as To Be Continued, a new module booking is created together with the registration to the exam.

For more information, see Customizing for Student Lifecycle Management, by choosing Student Lifecycle Management -> Student Lifecycle Management Processes -> Academic Records -> Assessment Process -> BAdI: Determine Expected Assessment Processes

1.2.4.3 Assessment Process Based on Programs

Use

When you register a student for an assessment, you open an assessment process. This assessment process refers to an assessment or to a concrete scheduled assessment. The assessment process can either be based on programs and their stages or on module bookings [Page 129]. This document describes the assessment process based on programs.

Two statuses are related to an assessment process, a system status and a freely definable customer status. If an assessment process refers to the completion of a program or program stage, you can perform two audits [Page 143] with this assessment process (optional).

- The first audit checks if the student fulfills the requirements for admission to the assessment process.
- The second audit checks whether the student fulfills the requirements for successful completion of the assessment process.

Process Flow

An assessment process which is based on programs is executed as follows:

1. You create the assessments [Page 127] you require for your programs in the planning phase.
2. You also create the scheduled assessments [Page 127] for each assessment.
   • Whether you already create the scheduled assessments in the planning phase, or not until after (re-)registration when you know for sure how many students will take part in each assessment, depends on how your university's assessment processes are designed.
   • When you create a scheduled assessment, you can switch directly to assessment process editing by choosing the pushbutton with the quick info text Edit Assessment Process.
3. If the assessment process is used within Student Lifecycle Management processes, it is the system that opens the assessment process.
   ○ Assessment process for graduation
     When you register a student for graduation, the system automatically opens an assessment process. Audit type 1000 (graduation) is offered for this process. If the assessment is assigned to this audit type, it is not possible to open an assessment process manually.

Before you use graduation, you must enter the relationship Program Imparts Qualification in the program catalog. Ensure that the usage of the degree type assigned to the qualification is Program Completion.

○ Assessment process for admission
  When you create an admission application, the system automatically creates an assessment process. Audit type 4000 (admission) is offered for this process. If the assessment is assigned to this audit type, it is not possible to open an assessment process manually.

To use admission audits within admission, you must edit the program data of the program. Check Use Assessment Processes.

○ Assessment process for stage completion
  The student assessment process is either opened automatically by the system when a student is (re-)registered, or manually by the administrator after the (re-)registration period.
You can use the BAdI HRPIQ00REG0090 to configure your system so that it automatically opens assessment processes as a follow-up activity to (re-)registration. You can implement this BAdI in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Admission, Registration, and De-registration → Sessional Registration → Business Add-Ins (BAdIs) → BAdI: Subsequent Activities for Registration Dialogs.

To open assessment processes manually, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Edit Assessment Processes. When you have selected the program and process, choose the pushbutton Open Process. In the Open Assessment Process dialog box, you can open the assessment process for a specific scheduled assessment either for a single student or for a group of students whom you choose by means of a selection method. The assessment process then has the system status opened.

4. You can now assign a customer status according to your requirements. You make the setting for customer statuses in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Academic Records → Assessment Process → Define Customer Statuses.

5. You then run the audits [Page 143] for the assessment process. SAP provides the BSP application PIQ_AUDIT [Page 152] for manual creation of requirement profiles and audit runs. For mass-processing of audits use transaction PIQAUD_MP_CP – Audit (Process-Dependent). For more information, see the SAP Easy Access Menu, by choosing Teaching and Examination → Academic Record.
   a. First execute the admission process. Assign the student an admission profile for the assessment process. Then execute an admission run for the assessment process. If the admission run is successful, you can admit the student to the assessment process.
   b. When the student has been admitted to the assessment, assign him/her a completion profile for the assessment process. In the assessment process completion run, the system checks if the student has passed the assessment.
   c. In the Edit Assessment Process dialog, the system indicates whether the student is assigned an admission profile or a completion profile by displaying the relevant icon. The system also displays the results of the respective audit runs.

6. You can change the system and customer statuses for assessment processes. You can do this manually in the Edit Assessment Process dialog. You can also use the two reports provided for automatic status changes. You can access these reports from the SAP Easy Access screen by choosing SAP Menu and then Student Lifecycle Management → Teaching and Examination → Academic Records →
   ○ Change Process Status (Admission)
   ○ Change Process Status (Completion)
   These two programs enable you to change different attributes (customer status, system status, process reason) based on the result of the audit run.

7. When you have executed the assessment process completion run, close the assessment process. To do this, go to the Edit Scheduled Assessment screen, choose the pushbutton with the quick info text Perform Activity, and then select an activity. You can perform the following activities for an assessment process:
   ○ Open process
   ○ Reopen process
   ○ Cancel process
   ○ Complete process successfully
   ○ Complete process unsuccessfully
   You can only perform an activity if you possess the required activity authorization.
If the student did not pass the assessment, you can create a repetition attempt. To do so, choose the pushbutton with the quick info text Create Repetition Attempt. The system only allows you to do this if the current assessment process is closed, and the system status is not opened. You may only open one assessment process per student and assessment at a time.

1.2.5 Processes in Student Lifecycle Management

The applications in Student Lifecycle Management enable you to control the following core processes of your university:

- Planning of Academic Offerings
- Organization and Management of Studies
- Integrated Administration of Fees and Financial Aid in the Student Account [Page 134]

1.2.5.1 Planning Academic Offerings

Use

Student Lifecycle Management enables you to plan all of your university’s academic offerings.

Process Flow

Academic offerings are planned in two steps:

1. Planning of programs, academic specializations, and modules
2. Planning of academic events per module and stage

1. Planning Programs, Academic Specializations and Modules

In Student Lifecycle Management, you plan modules in the module catalog [Page 76]. In the module catalog, you create modules [Page 87], module groups [Page 88], and their relationships. If you require additional rules, you create these as rule containers [Page 116].

You define programs in the program catalog [Page 74]. There, you can assign module groups (academic specializations) and modules to the programs. You can also create rules as rule containers.

2. Planning Academic Events per Module and Stage

In Student Lifecycle Management, you plan the academic events of modules for the given stages using an integrated enhancement of the Training and Event Management application component.

You manage your resources using the functions of Training and Event Management. However, you create event offerings for modules [Page 82] in the Student Lifecycle Management module catalog [Page 76].

1.2.5.2 Organization and Management of Studies

Purpose

Student Lifecycle Management enables you to organize and manage the studies of students attending your university. From admission to de-registration, Student Lifecycle Management covers the following steps of student administration:

- The student is admitted to the university in the chosen program (following application processing)
- The student registers for the chosen program
- The student plans his/her studies by choosing program specializations and booking the teaching events of the modules assigned to the program
- Instructors conduct the teaching events and record the progress of students
- The student re-registers for the next academic session
- Upon program completion, the student de-registers or is de-registered by the university.
Prerequisites

- The programs [Page 19] are set up.
- Die student accounts [Page 134] are configured.
- The required academic periods (e.g. admission periods) are specified in the academic calendar [Page 9].
- The following rules are defined in the rules [Page 111] section of Student Lifecycle Management:
  - Rules for time limit and deadline checks based on academic calendar
  - Program admission rules

Process Flow

1. Application for Admission
   When you receive a student’s application for admission and the required supporting documents, you create the student master record using the Student File [Page 38] application. You can enter the external achievements that students have accomplished at other educational institutions if you have configured educational background [Page 107] in Customizing for Student Lifecycle Management accordingly.

2. Registration
   When you register a student, you process the student’s master data using the student file application. You can also assign an advisor to the student. When you have entered the required data, you can register the student for the chosen program.
   
   You can configure Customizing for Student Lifecycle Management so that students are registered or re-registered automatically when they book a module.

3. Academic Study Planning
   An advisor assists the student with study planning, and books the academic specializations, modules, and business events.

4. Re-registration
   You re-register students using the Student File application. The re-registration procedure is identical to the registration procedure. You can also grant students a limited leave of absence.

5. De-registration
   You de-register students using the Student File application.

1.2.5.3 Administration of Fees and Grants in the Student Account

Use

The student contract account (student account) [Page 37] in Student Lifecycle Management enables integrated administration of student fees and grants by offering functions for:

- Setting fees and grants
- Creating the student account
- Posting to the student account
- Invoicing and payment
- Distributing revenues

The student account is based on the Public Sector Contract Accounts Receivable and Payable (PSCD) application component.
Process Flow

1. **Setting fees**
   *Student Lifecycle Management* helps you to define a wide variety of fee types, and fee calculation and payment methods. You can calculate the fees for programs [Page 19], modules [Page 87], and event packages [Page 23]. You can also set application and administration fees.

2. **Creating the student account**
   When you create an applicant or a student in *Student Lifecycle Management*, this person automatically becomes a business partner of the university and is assigned a student account. The business partner serves as the basis for calculating and managing fees and grants.

3. **Posting to the student account**
   Based on the payment and calculation methods you have defined, the SAP system debits the fees for programs, modules and event packages, as well as other fees to the student account. Grants are credited to the student account for the intended purposes.

4. **Invoicing and payment**
   The functions in *Public Sector Contract Accounts Receivable and Payable* enable you to perform all activities involved in payment processing including invoicing, dunning, and so on, for students as well as for sponsors. Payments can be made by bank transfer, credit card, check, or in cash.
   You can display the account balance in the [student file](Page 38).

5. **Distributing revenues**
   In *Student Lifecycle Management*, you can define how fee revenues are to be distributed within the university. By doing so, you can integrate the fee revenues in your university’s financial accounting system.

For more information, see [Student Accounting (IS-HER-CM-AC)](Page 57).

### 1.2.5.4 Graduation

**Use**

You can administer all aspects of graduation from a student’s registration for graduation right up to the actual graduation ceremony. When you register a student for graduation, the system opens an assessment process which provides links to requirement profiles and audit runs.

**Integration**

You can use the transaction for editing [assessment processes based on programs](Page 131) to monitor assessment processes, and audits in particular.

You cannot create registrations for assessments with audit type “graduation” in the *Edit Assessment Process* transaction (transaction code PIQEVALREGM). These registrations can only be created within the graduation process.

If you want to generate requirement profiles and run audits, you can use the transaction for [process-dependent auditing](Page 150) or the [BSP application for audits](Page 152). The BSP application is a user interface that enables you to make specific adjustments based on a student’s individual requirements.

When you register a student for graduation, the system creates a link to the qualifications. You edit the qualification that is used for graduation from within the program’s academic structure. Qualifications that have not been conferred are flagged as “are being pursued”. This enables you to create and edit all conferment data before you actually confer the qualification.

The system creates other graduation data such as registration date, graduation status (graduation candidate, graduated, etc.), or graduation ceremony data as infotype data in the study object (object type CS). If the student is a graduation candidate, the system shows this status in the student header data.
Prerequisites

You have made the settings for graduation in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Academic Records → Graduation.

In order to be able to use all graduation functions, you must not only make the Customizing settings for graduation but also define the required grade calculation methods in Student Lifecycle Management Master Data → Qualifications → Grade Calculation Methods.

Activities

You can create and change graduation data per program or per student. To do so, go to the SAP Easy Access screen and choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Graduation →

- Edit Graduation per Program
- Edit Graduation per Student

1.2.5.5 Determining Progression

Use

You can use the progression application to monitor the academic progress of your students. The Student Lifecycle Management component offers two different types of progression:

- **Progression in a specific program type [Page 136]**
  
  In this type of progression run, the SAP System checks the progression of students registered in the specified program type and automatically sets the appropriate status indicator after successfully completing the check.

- **Progression in a specific program [Page 142]**
  
  In this type of progression run, the system allows you to manually set the progression status of students for each stage of their program.

Integration

In Student Lifecycle Management, you can book modules for a program or program type. You can define the module booking environment per client in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → Module Booking → Define Module Booking Environment:

- Value SC: Module bookings apply to the program.
- Value PT: Module bookings apply to the program type.
- If no value is specified or the value differs from the ones above, you can define whether the module booking applies to the program or program type.

When you book a module, the SAP System creates a where-used list:

- If the module booking applies to a program, the SAP System creates a record for the study object (CS) in the Where-Used List (Study) infotype (IT1724).
- If the module booking applies to a program type, the SAP System creates a record for the student object (ST) in the Where-Used List (Student) infotype (IT1725). The SAP System reads this data record when it executes program type progression.

1.2.5.5.1 Program Type Progression Process

Purpose

You use the program type progression program if the courses of study your university offers and the modules that students can book are based on program types. When you execute program type progression, the SAP
System checks the students’ progress in the given program type and automatically sets the relevant status indicators if the check is successful.

Prerequisites

Your system administrator has made the following settings in Customizing for Student Lifecycle Management:

- In the section **Student Lifecycle Management Processes → Module Booking:**
  - Defined the relevant module booking environment (see Integration under Determining Progression [Page 136].)

- In the section **Student Lifecycle Management Processes → Progression → Program Type Progression:**
  - Defined the program types
  - Assigned progression categories to each program type
  - Defined progress classifications, academic standings, or academic honors (These settings represent the progression results.)

- In the section **Student Lifecycle Management Processes → General Settings → Selection Methods:**
  - Assigned existing selection methods to selection method group PRGR
  - Implemented the additional selection methods you required in the business add-in HRPIQ00SELMETHOD and assigned these to selection method group PRGR

- In the section **Student Lifecycle Management Master Data → Academic Performance Indices:**
  - Defined performance indices for each progression category
  - Assigned performance indices to calculation points

- In the section **Student Lifecycle Management Processes → General Settings → Rules:**
  - Created substitutions in the VSR rules
  - Assigned the substitutions to callup point 0053 (progression)
    You have to map your university’s program type progression regulations in the VSR rules. You do this by creating a rule container and linking this rule container to non-academic callup point 0053.
    For more information, see Rules and Substitutions for Program Type Progression [Page 141].

Process Flow

When you run program type progression, the SAP System executes the following process:

1. The SAP System selects the desired programs based on the given selection method and selection variant (from objects of the study object type).
2. The SAP System filters the selected objects based on the values you specify in the check-to date, execution category and program type parameters. For more information, see Program for Program Type Progression [Page 138].
3. The SAP System executes progression for those students who have taken academic work in the given program type and whose data match the specified filter criteria. Progression is determined per student on the basis of his/her program types and the active progression categories.
4. The progression program first calls the hold manager at callup point 0053, which it then uses to determine if a progression hold is set for the student in question.
   If so, progression is terminated.
   If not, progression continues as described in the following.
5. Each time the SAP System reaches one of the calculation points defined for progression, it branches to the performance index calculation assigned to the calculation point in question and transfers a specific set of academic work objects.
An academic work object is included in program type progression if the following conditions apply:

- The academic work object is assigned to the program type.
- The relevant progression categories are active (flagged).
- The valid-from date of the module booking is before or identical to the check-to date (and is after the internal check-from date).

6. From the given set of academic work objects, the SAP System determines the performance indices which are assigned to the calculation point.

7. The SAP System returns the performance indices it determines to the progression application.

8. The progression application transfers the program types and progression categories as well as the performance indices it determines to the VSR rules at callup point 0053.

9. Using the rules assigned to callup point 0053 in the VSR rules, the SAP System determines whether the performance indices meet the given requirements. If so, the system uses substitutions defined in the rules to set the result for the progression category and the result status.

   The progression application branches to the rules only once per student. The substitutions for all program types and progression categories are executed successively (this is due to the fact that the system has only one callup point for progression, which is 0053). You therefore have to configure the rules so that the SAP System can process the relevant program types and progression categories when this one callup point is reached.

10. The VSR rules returns the progression result and the associated result status (final, projected, or pending). (You can define the individual progression results in Customizing when you create the program types.)

11. The SAP System writes the result and the associated result status in the Progression infotype record (1737) of the student (object type ST). You can display this result on the Program Type Progression tab page in the student file.

12. The progression application calls the hold manager to which it then transfers the result and result status. The hold manager then performs the further process steps.

Result

The SAP System displays the program type progression result and the associated result status on the Program Type Progression tab page in the student file.

The hold manager sets the holds and statuses for the student in question based on the values transferred; automatic or manual processing is possible here.

1.2.5.5.1.1 Program for Program Type Progression

Use

The program for program type progression checks the academic progress of students who are registered in a specific program type. After successfully completing the check, the program automatically sets the results for one or more of the following progression categories:

- Academic standing according to institutional rules
- Academic standing according to the rules governing financial aid
- Progress classification according to institutional rules
- Progress classification according to the rules governing financial aid
- Academic honors

You can manually override the values set by the program.
Integration

Selection Method and Variant

Before you can execute this program, you must enter a selection method on the program selection screen. The SAP System uses the selection method to select the objects for which progression is to be determined. When you have selected a selection method, the SAP System displays the Selection Variant field. In this field, you must specify a selection variant. If the system does not offer any possible selection variant entries, you can create the selection variant you require.

For more information, see Object Selection for Program Type Progression [Page 30].

Program Type

The program type groups the programs for which progression is determined concurrently. You must therefore define the program type in the program object (SC). You can also define the program type for an academic work object (module or miscellaneous academic work object), or assign it to a module booking manually. A module booking can be assigned several program types.

You can book an academic work object for a program or program type. You can define whether the SAP System should always make bookings either to the program or to the program type, or whether users should be allowed to select between these two object types. You make this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → Module Booking → Define Module Booking Environment.

Prerequisites

For an overview of the required Customizing settings, see Program Type Progression Process [Page 136].

Features

You can control program type progression by means of the following fields on the program selection screen.

Check-To Date

The check-to date is the date up to which academic work is included in the progression run, and thus defines the academic work which is relevant for progression. The program also uses the check-to date when calculating performance indices. The check-to date influences the execution category of the program.

The SAP System proposes the check-to date value which it determines as follows: The top organizational unit [Page 73] in the academic calendar must contain a value for time limit 0100 (standard duration of the academic session). Based on the system date, the SAP System determines the current session for time limit 0100 of this organizational unit, and uses the end date of this session as the default check-to date.

Internal Check-From Date

The SAP System uses an internal check-from date. The check-from date is the day after the check-to date of the last progression run. If progression has not yet been executed, the SAP System uses the start date of the study object (object type CS) as the check-from date.

The period between the check-from date and the check-to date is the check period. The SAP System includes all the academic work objects whose valid-from date is within the check period in the progression run. The valid-from date of an academic work object is the key date as of which this academic work object is relevant for progression. This key date is stored in the Where-Used List (Student) (1725) infotype record of the student (object type ST) (Valid From field).

The check-from date is also used to determine grade averages in performance index calculation.
**Valid-From Date**

This is the date as of which progression is valid for the student. This date must be greater than or equal to the check-to date. The SAP System proposes the day after the check-to date (check-to date plus one) as the default value.

**Execution Category**

The execution category defines the mode in which program type progression is executed. The system offers the following execution categories for progression:

<table>
<thead>
<tr>
<th>Execution Category</th>
<th>Prerequisite</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initialize</td>
<td>No progression data exists for the student in the specified program type.</td>
<td>The initial progression run provides the basis for progression runs with other execution categories.</td>
</tr>
<tr>
<td>New</td>
<td>An initial progression run was executed. &lt;br&gt; No progression data exists for the check-to date.</td>
<td>The SAP System determines a new progression result</td>
</tr>
<tr>
<td>Repeat</td>
<td>An initial progression run was executed. &lt;br&gt; Progression data already exists for the check-to date. The SAP System uses the check-to date of the last progression run. &lt;br&gt; Only the last progression run may be repeated. Progression runs before the last run cannot be repeated.</td>
<td>The SAP System redetermines the progression data (for the check-to date of the last progression run).</td>
</tr>
<tr>
<td>Automatic</td>
<td></td>
<td>The SAP System automatically determines the appropriate execution category (initialize, new, or repeat).</td>
</tr>
<tr>
<td>Manual</td>
<td>An initial progression run was executed.</td>
<td>Depending on which check-to date you specify, the SAP System either overwrites the existing progression results with manually entered values or it creates a new progression result with these values. This execution category does not require any VSR rules.</td>
</tr>
<tr>
<td>Reset</td>
<td>An initial progression run was executed.</td>
<td>The SAP System resets the progression results of the check periods that overlap with the specified check-to date or are after this check-to date. Check periods whose check-to dates are before the specified check-to date are not taken into account.</td>
</tr>
</tbody>
</table>
**Program Type**

The program type you specify on the selection serves as a filter for the selection criteria of the selection method and its selection variant. (You can also specify several program types.)

The selection method and its selection variant select programs which are assigned to program types A, B, and C. However, you want to execute progression only for program type C. You therefore select this program type as the filter value.

If the selection method and its selection variant select program types D and E and you entered program type C in this field, progression is not executed.

**Progression Categories**

On the program selection screen, only the fields of the progression categories which are relevant for the given program type are ready for input. Consequently, the progression categories you can use for a program type must be assigned to this program type in Customizing for Student Lifecycle Management (IMG activity Create Program Types).

If required, you can restrict the allowed progression categories in the Where-Used List (Student) (1725) infotype record of the student. This may be necessary if one of the student’s academic work objects is relevant for several program types.

On the program selection screen, you can further restrict the allowed progression categories by removing the flag from the progression category you want to deactivate.

You can manually enter the result and result status for an allowed progression category only if you have selected the execution category **manual**.

**Activities**

To execute program type progression, choose **Student Lifecycle Management → Teaching and Examination → Program Type Progression** from the SAP menu. When you have entered the required values, choose **Execute**.

After executing the progression run, the SAP System outputs a log containing the processing statistics and the messages it output.

**1.2.5.5.1.2 Rules for Program Type Progression**

**Use**

The **program type progression** program transfers the program types, progression categories and performance indices it determines to the VSR rules at callup point 0053 (progression) (see Program Type Progression Process [Page 136]).

The progression program branches to the rules only once per student. The substitutions for all program types and progression categories are executed successively (this is due to the fact that the system has only one callup point for progression, which is 0053). You therefore have to configure the rules so that the SAP System can process all the relevant program types and progression categories when this one callup point is reached.

Callup point 0053 is a non-academic VSR callup point with relevance for status indicators (see table T7P1QCHECKTP (Callup Points)).

Configuration of the rules is a very complex undertaking which requires a detailed knowledge of these. For information on this, read the documentation on rules [Page 111].
Integration

The SAP System uses the following structures when it transfers data to the rules:

- PIQRULEPROGR_GR (VSR Data: Program Type Progression)
- PIQRULEPROGR_GR_EXT (Progression: Structure for Tabular Data)
- PIQRULEPROGR_GR_RESULT (Progression Result for Program Type)

Example

Before you can execute progression, you have to create the substitutions you require in the rules. You can create a substitution which sets the following three values:

13. Decision: Is the progression prerequisite fulfilled for the given progression category?

The SAP System uses a substitution to set the value which determines if the academic prerequisite for progression is fulfilled. The SAP System can use this value to determine if progression should be executed for a progression category.

In a particular progression category, students must have earned at least 12 credits since the check-from date before progression can be run for this progression category.

The prerequisite could be structured as follows:

a. Does progression category A (the one to be checked) exist?

b. Do the required number of credits exist?

c. Is the program type in question B, and do the required number credits (for B) exist?

14. Progression result

You have defined the possible progression result values in Customizing when you created the program types. The SAP System sets these values in the structure PIQRULEPROGR_GR_RESULT.

When you create substitutions, the system does not offer search help with the possible progression result values. You therefore have to copy these values from Customizing, for example, to a clipboard.

15. Result status

The SAP System derives the result status from the result of performance index calculation, and can replace this value in the rules using a substitution. The result status can have the following values:

- **Final**: The SAP was able to determine a definitive progression result.
- **Pending**: The SAP was not able to determine a definitive progression result, for example, because the module bookings have not all been followed-up.
- **Projected**: The SAP was not able to determine a definitive progression result, for example, because the module bookings have not all been followed-up and the specified check-to date is in the future.

1.2.5.5.2 Program Progression

Use

You can use the *program progression* application to manually set the progression status of students in each stage of their registered programs.

You first choose the students in a particular program based on the selection criteria *academic year*, *academic session*, and *stage*. In the list the SAP System displays for the given criteria, you can set one progression status for each student.
Integration

The SAP System displays the progression statuses you have set manually on the Program Progression tab page in the Student File [Page 38].

Prerequisites

You have defined the required progression statuses. You make this setting in Customizing for Student Lifecycle Management in the section Student Lifecycle Management Processes → Progression → Program Progression → Create Progression Statuses.

Activities

16. From the SAP menu, choose Student Lifecycle Management → Teaching and Examination → Program Progression.
17. Select the desired program using the object manager [Page 26].
18. Enter the academic year, academic session, and the stage.
19. Choose Determine Students.
   The SAP System displays the students that satisfy the given selection criteria.
20. Set the appropriate progression status for each student.
21. Choose (Save).

1.2.5.6 Audit

Purpose

You can use Student Lifecycle Management audit functions like Stage Audit and Degree Audit to set the general and special requirements students have to fulfill, and to check if the academic work they have completed meets these requirements.

(See also: Audit Overview [Page 144])

Prerequisites

You have made the required settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Audits.

For index-dependent subrequirements, you require performance indexes. You define these in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Performance Indexes.

For index-independent subrequirements, you require conditions. You implement these in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Audits → Requirements → Subrequirements → BAdI: Subrequirement Condition.

For auxiliary conditions, you require key figures [Page 125]. You define these in Customizing for Student Lifecycle Management under Student Lifecycle Management Master Data → Key Figures.

If you want the system to generate module proposals for a subrequirement, you must create the appropriate selection methods. You define these in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → General Settings → Selection Methods. The system uses the selection method group AUDS for audits. For more information, see Object Selection Using a Selection Method [Page 29].

Process Flow

22. You edit requirement catalogs [Page 145] by assigning them (concrete) requirements, subrequirements, and auxiliary conditions.

   You can access the requirement catalog editing transaction from the SAP Easy Access screen by choosing SAP Menu → Student Lifecycle Management → Academic Structure (Curriculum) →
You define the usage for requirements. General university requirements (rule container) are linked to a faculty, that is to an organizational unit (object type O), program requirements to a program (object type SC,) and requirements for academic specializations to module groups (object type CG).

23. You assign the main requirement catalog and catalog version to each student on the Requirement Catalogs tab page in the Student File.

If you do not want to assign each individual student a main requirement catalog, you can assign the main requirement catalog to a specific organizational unit (object type O) in the academic structure. If you do so, you must also assign the audit type an evaluation path which the system can use to find this organizational unit. You assign the evaluation path in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Processes → Audits → Basic Settings → Define Audit Types.

24. If the requirements for a student are taken from different requirement catalogs, the system uses the catalog version you have flagged for each requirement catalog.

The catalog version is determined as follows:

a. If you have assigned the student a specific version of the requirement catalog in the student file, the system uses this catalog version.

b. If you have not assigned the student a specific version of the requirement catalog in the student file, the system uses the version within the requirement catalog version set which is flagged as the default version. You set this flag in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Audits → Requirement Catalogs → Define Structure of Version Sets.

If the system finds a rule container (object type RC) using a requirement selection, the rule container contains the name of the requirement catalog to which it belongs. The system also requires the catalog version when it determines the subrequirement.

25. You create a requirement profile [Page 147] for the students for whom you want to run an audit.

If you want the system to generate requirement profiles (and execute audit runs) automatically, you can use the following report programs:

- RHIQAUDIT_MP_CP (Audit (Process-Dependent)) [Page 150]
- RHIQAUDIT_MP_CS (Audit (Process-Independent)) [Page 151]

26. You start the audit run [Page 149] with one of the above report programs. In the audit run, the system compares the requirements in the requirement profile with the student’s completed and transferred academic work, and displays the results.

You can use the BSP application PIQ_AUDIT [Page 152] to edit requirement profiles individually, and to start audit runs. The BSP application enables you to make manual changes and corrections, for example if the result is not fulfilled.

1.2.5.6.1 Audit Overview

Audits are always performed on the basis of a requirement profile [Page 147]. Requirement profiles are generated individually for each student. The system generates the requirement profiles based on the program and specialization in which the student is registered.

Activities

1. You first have to create the requirements and subrequirements for each version of the requirement catalog [Page 145].

Requirements refer to academic objects, for example:
○ General university requirements refer to an organizational unit.
○ Program requirements refer to a program.

2. Requirement profiles have a structure, such as:
   a. Overall result
   b. General university requirements
   c. Program requirements, etc.

You therefore first have to create the requirement pattern which maps this structure in Customizing for Student Lifecycle Management.

The system uses this structure as a basis when it determines the concrete requirements and subrequirements from the requirement catalog for a student’s program or specialization. The system uses requirement selections to determine this information. The result is a requirement profile.

3. You can compare the requirements defined in the requirement profile with the academic work taken by the student by means of an audit.
   ○ The system can generate requirement profiles and execute audits automatically. It does this when you run the following report programs:
     ■ RHIQAUDIT_MP_CP (Audit (Process-Dependent)) [Page 150]
     ■ RHIQAUDIT_MP_CS (Audit (Process-Independent)) [Page 151]
   ○ If you want to change individual requirement profiles (and subrequirement exceptions) or correct audits manually, you can use the BSP application PIQ_AUDIT [Page 152].

1.2.5.6.2 Requirement Catalogs

Use

You use requirement catalogs to map the general and special requirements (program requirements, exam rules and regulations, etc.) which your university uses as a basis for audits [Page 143] (see also Audit Overview [Page 144]).

The requirement catalogs in Student Lifecycle Management have two functional levels:

• In Customizing for Student Lifecycle Management (under Student Lifecycle Management Processes → Audits → Requirement Catalogs), you combine (abstract) requirements and requirement patterns to requirement catalogs, and specify which organizational unit is responsible for these catalogs. The requirement patterns provide a rough structure for your (abstract) requirements. You then assign each (abstract) requirement a requirement selection or an evaluation path:
   ○ A requirement selection is an implementation of the business add-in requirement selection. It determines the rule containers [Page 116] (object type RC) for the requirements from the academic structure. The rulecontainer represents the instance of a requirement.
   ○ Using the evaluation path defined for the requirement selection, the system determines the academic objects which contain the subrequirements. If this academic object is a rule container (object type RC), the system uses this rule container. If the academic object in question is of a different type, the system uses the rule containers assigned to this object.

• At the application level, the different organizational units of your university (e.g. faculties) can edit the requirement catalogs they require by assigning them their (concrete) requirements and subrequirements. When they make these assignments, they can create new requirements and subrequirements or use the existing requirements and subrequirements. The concrete requirements are the rule containers (object type RC), and the assigned subrequirements are the rule modules.

You may only assign each requirement (rule container) to one requirement catalog.

When you create a requirement profile for a student, the system combines these two functional levels. First, the system determines the requirement pattern for the main requirement catalog defined for the student in the student file. If the student is not assigned a main requirement catalog, the system searches for one using...
the evaluation path assigned to the audit type in question, and then uses the requirement pattern assigned to this main requirement catalog. Then, by reading the requirements of this requirement pattern, the system derives the rule containers (concrete requirements) and rule modules (subrequirements) for the assigned requirement selections and evaluation paths. Subrequirements can differ in the different requirement catalog versions. The system therefore chooses only those subrequirements which are contained in the main requirement catalog version assigned to the student. If the student is not assigned a main requirement catalog, the system uses the standard version of the main requirement catalog it derived.

In this way, the system assembles the concrete requirements and subrequirements for a student in the requirement profile.

The requirements that a student must satisfy can come from a single requirement catalog. They can also come from different requirement catalogs. For example, a university’s general academic requirements can be specified in one requirement catalog while the special program requirements of each faculty can be outlined in separate requirement catalogs.

You can link the general academic requirements with the top organizational unit [Page 73] of Student Lifecycle Management.

Integration

The audit program uses the:

- Functions for performance index calculation and selection methods [Page 29] for index-dependent subrequirements
- Functions for conditions and selection methods for index-independent subrequirements
- Functions for key figures [Page 125] for auxiliary conditions

Features

When you edit a requirement catalog at the application level, you can assign this requirement catalog (concrete) requirements to which you can then assign subrequirements or auxiliary conditions. You can create new requirement elements or use existing ones. For existing subrequirements and auxiliary conditions, you can use the subrequirement manager.

When you create a subrequirement, you first define whether this subrequirement is index-dependent or index-independent. An index-dependent subrequirement is based on one or more performance indices; an index-independent subrequirement is based on a condition. This subrequirement category determines which elements you can assign to the subrequirement:

- Elements of an index-dependent subrequirement:
  - Performance indices and their target values
    - The system uses a performance index, for example, to determine the number of modules taken or the number of credits earned.
  - Filters for selection of academic work objects
    - The system uses a filter, for example, to determine the academic work objects that belong to a specific category or discipline. You use the category or discipline as a parameter.
  - Selection method [Page 29] for module proposals
    - The system uses a selection method to determine the modules a student needs to book in order to satisfy the subrequirement. The system proposes all the modules the student is able to take.

- Elements of an index-independent subrequirement:
  - Conditions (implementation of the business add-in subrequirement condition)
    - The system uses a condition, for example, to determine if the student has submitted a dissertation or taken academic work in a specific category.
○ Selection method for module proposals (see above)

When you create filters or conditions, the system proposes the parameters which are assigned to these filters or conditions in Customizing. Each parameter is listed in a separate line. You must enter a value for the parameters which are not optional. Optional parameters can retain their initial values. If input help is defined for a parameter in Customizing for Student Lifecycle Management, you can use this here.

You implement the performance indices, filters, conditions, and selection methods you need when you define subrequirements in Customizing for Student Lifecycle Management. You must assign the selection methods you want to use for subrequirements to selection method group AUDS so that these are offered as possible entries in the input help.

You can use auxiliary conditions like subrequirements, to map degree or stage requirements in the system. The system saves the auxiliary condition and the subrequirements in concrete requirements, technically speaking, in the rule container (object type RC) of infotype 1747. If only the auxiliary conditions of a requirement must be fulfilled, and not the implicit condition ("100 % of all subrequirements must be fulfilled for the requirement to be fulfilled") and auxiliary conditions, you can switch off the implicit condition. If you do not switch it off, all subrequirements and auxiliary conditions must be fulfilled. You use key figures to define auxiliary conditions.

The system offers a version management function for your requirement catalogs. You can use this version management function, for example, to map the different versions of your academic and exam regulations. When you generate a requirement profile for a student, you can define which catalog version, that is, academic or exam regulation version, is valid for this student. You can combine the versions which you use for each individual requirement catalog to a version set in Customizing.

Activities

To edit concrete requirements, subrequirements and auxiliary conditions for the different requirement catalogs, go to the SAP Easy Access screen and choose Student Lifecycle Management → Academic Structure (Curriculum) → Requirement Catalogs → Edit Requirement Catalog from the SAP Menu.

1. Choose the desired requirement catalog and audit type, and check the default catalog version.
2. Select a process part, and if required, a parameter value.
   Whether or not you require a parameter value depends on the audit type. The audit type stage audit requires the parameter stage, for instance.
3. To list the assigned requirements, subrequirements and auxiliary conditions, choose Select Requirements.

You can copy the content of one requirement catalog version to another one by choosing the menu option Edit → Copy Version.

You can transfer the responsibility for a specific requirement catalog to a different organizational unit by choosing the menu option Edit → Change Responsibility. However, you cannot define the authorization for the requirement catalog with this assignment. The assignment is used for evaluation purposes only.

You can view and change the requirement assigned to the academic structure and thus determine where it is used in the system by choosing the menu option Edit → Display or Edit Acad. Structure Assgmt.

1.2.5.6.3 Requirement Profile

Use

In the requirement profile, you set up the (concrete) requirements, subrequirements and auxiliary conditions for each program in which a student is registered (see also: Audit Overview [Page 144]). You first have to edit the requirement catalogs [Page 145] you need for the requirement profile. You have assigned a main
requirement catalog to the student in the student file, or you have configured a general derivation for the main requirement catalog via the academic structure by creating an evaluation path (see Process Flow under Audit [Page 143]).

Activities

**Automatic Generation of Requirement Profiles**

You can create requirement profiles automatically with the following report programs:

- RHQAUDIT_MP_CP (Audit (Process-Dependent)) [Page 150]
- RHQAUDIT_MP_CS (Audit (Process-Independent)) [Page 151]

**Manual Creation of Requirement Profiles**

You can use the BSP application PIQ_AUDIT [Page 152] to edit requirement profiles individually. The BSP application enables you to make manual changes, for example, if a result is not fulfilled.

Start the BSP application PIQ_AUDIT with the required audit type and view, and then proceed as follows to create a profile:

4. Choose a student.
5. If you use processes like an assessment process, you first have to choose a process part.
   The system displays the main catalog and version for which it generated the requirement profile.
6. Choose a requirement profile type.
7. Generate a requirement profile for the main requirement catalog.
   The system determines the requirement pattern and the associated (abstract) requirements from the main requirement catalog and the catalog version. Using a requirement selection or the evaluation path you defined in Customizing for Student Lifecycle Management, the system derives the concrete requirements and, from the assigned catalog version, the concrete subrequirements and auxiliary conditions. Based on this information, the system generates an initial requirement profile and then displays it.
8. You can change this initial requirement profile by
   - Creating additional subrequirements and auxiliary conditions
   - Defining that a given default subrequirement does not have to be fulfilled
     In this case, you delete the subrequirement from the profile.
   - Creating an exception reason and a note
   - Specifying exceptions for subrequirements and auxiliary conditions.
   Choose the *Exceptions* tab page in the BSP application PIQ_AUDIT. Exceptions can be:
     - The subrequirement is fulfilled.
     - You can change the target values of subrequirements, for example, specify that only 2 credits are required instead of 8.
9. You can save the requirement profile you have created and edited under a specific profile name.
   When you save the requirement profile, the system saves it in the form displayed. When you call this requirement profile the next time, the system does not generate it again but simply displays the requirement profile it saved.
10. You can lock the requirement profile to prevent it from being changed.
11. You can execute additional audit runs [Page 149] based on the saved requirement profile.
1.2.5.6.4 Requirement Profile Templates

Use

You can create and edit requirement profile templates for programs of study [Page 19]. These templates make it easier for you to compile student requirements. You can structure the requirement profile templates you create like you want the personal requirement profiles of students to be structured.

The standard transaction for editing requirement catalogs [Page 145] is transaction PIQRLCATM (Edit Requirement Catalogs). When you generate a requirement profile for a student via a requirement catalog, the system derives the concrete requirements (rule containers) for this student from the requirement selections which are defined for the requirement elements of a requirement pattern.

The requirement profile templates are quite useful if the requirements for students are clearly defined and do not contain numerous options. An example of this is the admission audit [Page 152].

You can create requirement profile templates based on academic specializations (these are also called subprofiles). When the system adopts a student’s personal requirement profiles, it only takes the subprofiles of the specializations the student has chosen into account.

You can also create and edit templates for special students. In this case, you must enter a student attribute when you create the template. These student attributes are filter-dependent implementations of the business add-in Requirement Profile Templates Based on Student Attributes.

Prerequisites

You can make the settings for requirement profile templates in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Audits → Requirement Profile Templates.

If you want the system to use templates and not the standard derivation when it generates personal requirement profiles, you must specify which template is to be used in which program in the Requirement Catalogs infotype (1778).

1.2.5.6.5 Audit Run

Use

In an audit run, you can determine which subrequirements and auxiliary conditions the student satisfies and which not, and which ones are still in process (see also Audit Overview [Page 144]).

You can evaluate the data automatically with the following report programs:

- RHIQAUDIT_MP_CP (Audit (Process-Dependent)) [Page 150]
- RHIQAUDIT_MP_CS (Audit (Process-Independent)) [Page 151]

You can use the BSP application PIQ_AUDIT [Page 152] to make corrections in audit runs. The BSP application enables you to make manual changes, for example, if a result is not fulfilled.

If the subrequirements are index-dependent, the system performs the evaluation as follows:

- The system assigns the academic work objects of the student which match the filter criteria (see Features under Requirement Catalog [Page 145]).
- The assigned academic work objects are used as the calculation basis for performance indices.
- The system compares the performance indices with the target values (see Features under Requirement Catalog [Page 145]), and determines whether or not the student fulfils the subrequirement.

If the subrequirements are index-independent, the system performs the evaluation as follows:
● The system evaluates the condition (see Features under Requirement Catalog [Page 145]).

● The system determines whether the student meets the subrequirement from the result.

If all of the subrequirements of a requirement are fulfilled, then the requirement itself is fulfilled. If the requirement has an auxiliary condition, the requirement is fulfilled when all the subrequirements and the auxiliary condition are fulfilled.

If only the auxiliary conditions of a requirement have to be fulfilled, and not the implicit condition ("100 % of all subrequirements must be fulfilled for the requirement to be fulfilled") and auxiliary conditions, you can switch off the implicit condition. If you do not switch it off, all subrequirements and auxiliary conditions must be fulfilled.

You can also perform these steps manually and overwrite the system defaults if the BSP application view you are using allows this.

If you execute or change requirements manually, you can have the system generate a module proposal for each subrequirement. This is advisable in cases where the student has not completed any academic work which fulfils the subrequirement. You can use a search function to find the modules. You can assign these modules to subrequirements, for example, if you want to simulate specific configurations.

You want to simulate the following audit runs:

• Audit run with another program, for example for a change of program
• Audit run with another academic specialization
• Audit run with possible module choices

Prerequisites
You have created a requirement profile [Page 147] for the student.

1.2.5.6.6 Process-Dependent Audit

Use
You can use report program RHIQAUDIT_MP_CP (Audit (Process-Dependent)) to execute the following functions for a set of assessment processes:

● Generate requirement profiles
  The system generates new requirement profiles.

● Execute audits (create)
  The system executes an audit for the existing requirement profiles.

● Check audits (change)
  The system checks the existing audits again. You can only use this function if audits exist for the selected objects.

Activities
To start the report program, proceed as follows:

1. From the SAP Easy Access screen, choose SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Audit (Process Dependent).
2. Choose a selection method.
3. Select an existing selection variant, or create a new selection variant.
4. Then enter the following parameters:
   ○ Processing type
   ○ Audit type
The system determines if additional parameters are required for the audit type you have chosen.

- If you use the audit program for a stage audit, you must use the stage as a parameter. You do not have to enter this value; it is optional. You can also use this parameter as an additional filter criterion if you wish to.
- **Process part**
- **Requirement profile type**
- **Execution mode**
  If you have selected the processing type **Generate requirement profile**, you cannot enter an execution mode.

The parameters you enter may restrict the selection result of the selection variant.

5. Choose with the quick info text *Execute*.

### 1.2.5.6.7 Process-Independent Audits

#### Use

You can use report program RHIQAUDIT_MPCS (*Audit (Process-Independent]*) to execute the following functions for a set of CS object types (*study*):

- **Generate requirement profiles**
  The system generates new requirement profiles.
- **Execute audits (create)**
  The system executes an audit for the existing requirement profiles.
- **Check audits (change)**
  The system checks the existing audits again. You can only use this function if audits exist for the selected objects.

#### Activities

To start the report program, proceed as follows:

1. From the SAP Easy Access screen, choose **SAP Menu → Student Lifecycle Management → Teaching and Examination → Academic Records → Audit (Process Independent)**.
2. Choose a selection method.
3. Select an existing selection variant, or create a new selection variant.
4. Then enter the following parameters:
   - **Processing type**
   - **Audit type**
     The system determines if additional parameters are required for the audit type you have chosen.

If you use the audit program for a stage audit, you must use the stage as a parameter. You do not have to enter this value; it is optional. You can also use it as an additional filter criterion if you wish to.

- **Requirement profile type**
- **Execution mode**
If you have selected the processing type Generate requirement profile, you cannot enter an execution mode.

The parameters you enter may restrict the selection result of the selection variant.

5. Choose with the quick info text Execute.

1.2.5.6.8 BSP Application for Audits

Use
You can use the BSP application PIQ_AUDIT to edit and manage requirement profiles and audits. Audits can be used to monitor degree or stage completion.

The BSP application enables you to make manual changes and corrections, for example if the result is not fulfilled. For automatic evaluations, you can use the following report programs:

- RHIQAUDIT_MP_CP (Audit (Process-Dependent)) [Page 150]
- RHIQAUDIT_MP_CS (Audit (Process-Independent)) [Page 151]

Features
The BSP application offers different views of the application and can be called from the following views, which are predefined by SAP:

- EV01 - Expert view (with reference to assessment processes)
- EV02 - Expert view
- EXV1 - Extended maintenance dialog (with reference to assessment processes)
- EXV2 - Extended maintenance dialog
- SV01 - Student view (with reference to assessment processes)
- SV02 – Student view

The views are intended for different users (for example, students, experts, or extended maintenance dialog) whom the system offers different editing options. For each view, you can define which actions (create audit, create requirement profile, etc.) and which exceptions (overwrite key figures, insert or delete subrequirement, etc.) are allowed. By doing so, you can change the appearance of the user interface. If the creation of requirement profiles is not allowed in a particular view, then the system will not display the pushbutton for this action. For example, if you do not activate the exception which allows overwriting of key figures in a view, then the respective fields are not ready for input.

You can also have a BSP application refer to an assessment process (see Assessment Process Based on Programs [Page 131]). In this case, the system displays the assessment process when you create requirement profiles and audits.

You make view settings in Customizing for Student Lifecycle Management under Student Lifecycle Management Processes → Audits → Adjustment of User Interfaces.

1.2.5.6.9 Admission Audit

Use
You can run admission audits [Page 143]. When you activate this function for a program of study, the system automatically creates an assessment process with the requirements that have been defined for this program.
The following functions cannot be used for admission audits:

- It is not possible to create [scheduled assessments](Page 127) for admission audit assessments in the *Edit Assessments* transaction (transaction code PIQEVALM).
- It is not possible to create registrations for admission audit assessments in the *Edit Assessment Process* transaction (transaction code PIQEVALREGM). Registrations can only be created within the admission process.

**Integration**

The system automatically recognizes and duns unfulfilled requirements, such as missing documents. You can create reminders for missing requirements with the *correspondence dunning run* function (transaction FPCODU). As these reminders are created with the Print Workbench, all the tool’s other setting options are also available to you.

You can manage the documents you receive and the ones that are missing by connecting to [SAP Records Management](Page 162). For more information about this topic, see [Integration of Records Management](Page 162).

When you compile requirements for admission audits, you can use [requirement profile templates](Page 149).

**Prerequisites**

You have made the required settings for admission audits in Customizing for [Student Lifecycle Management](Page 149).

You have explicitly activated this function for every program of study that uses it in the *Program Data* infotype (1730). You activate this function by setting the *Use Assessment Process* indicator there. This activation must apply from the start of the semester to avoid problems with the admission applications that already exist for each program.

You have made the required settings for dunning inbound correspondence. You make these settings in Customizing for [Student Lifecycle Management](Page 149) under [Student Lifecycle Management Processes → General Settings → Correspondence → Inbound Correspondence](Page 149).

If you want to run [SAP Records Management](Page 162), you must set up a basic configuration of [SAP Records Management](Page 162).

**Activities**

If the admission audit function is activated for the program you are processing, you can switch to admission editing by choosing the *Audit Details* pushbutton on the *Admission* tab page in the *Student File*. There, you can run an audit by choosing the *Execute Audit* pushbutton.

You should schedule the job for dunning missing inbound correspondence at regular intervals.

**1.2.5.7 Audit Trail**

**Use**

The audit trail enables you to keep track of which data was changed when and by whom. The system records data changes in change documents or activity documents.

**Prerequisites**

You must activate Business Configuration Set ISHERCM_INFTY_CHDOC to enable the creation of change documents. For more information, go to Customizing for [Student Lifecycle Management](Page 149) and refer to IMG activity *Activate Creation of Change Documents for Infotypes*.
Features

Student Master Data
When you change student master data, the system logs these changes in the following infotypes by creating change documents:

- 1701 (Status Attributes)
- 1702 (Personal Data)
- 1703 (Challenge)
- 1704 (Additional Personal Data)
- 1705 (Individual Study Data)
- 1706 (Fee Calculation Data)
- 1711 (Residence Data)
- 1712 (Visa)
- 1718 (Employment)
- 1719 (External Transcripts)

To view the change documents in student master data, choose the following menu options there:

- Extras → Change Documents → For this Student
- Extras → Change Documents → For this Tab Page

UCAS (Only Relevant for Great Britain)
The system logs changes in the following UCAS-specific infotypes by creating change documents using UCAS functions:

- 1782 (UCAS: HESA Data)
- 1783 (UCAS: Program Choices)
- 1785 (UCAS: School Results)
- 1786 (UCAS: Clearing Details)

Specializations
The audit trail for specialization bookings comprises activity documents in combination with change documents. The system logs data changes in infotype 1001 (Relationships) with subtype 516 in change documents.

The system uses activity CB05 (Specializations: Extended Maintenance) to distinguish between regular data processing and the extended maintenance dialog. The system checks this activity using the authorization check function for extended maintenance.

You can view the activity documents and the associated change documents on the Activity Documents tab page of the student file.

Re-registration
The system logs changes in the following infotypes.

- 1769 (Study Segment)
- 1770 (General Data)
- 1771 (Registration/Re-registration)
- 1001 (Relationships) with subtype B516
The system logs changes to detailed data in change documents which you can view in the activity documents on the Activity Documents tab page of the student file.

**Qualification Conferment**

The system logs data changes in infotype 1001 (Relationships) with subtype 523 and in the database tables for appraisals. The system logs changes to detailed data in change documents which you can view in the activity documents on the Activity Documents tab page of the student file.

**Equivalency Determination**

The system logs the following data changes in change documents:
- Infotype 1001 (Relationships) with subtype 506 (module booking)
- Infotype 1001 (Relationships) with subtype 532 (qualification conferment)
- Infotype 1725 (Academic Work Usage)
- Database tables for appraisals

The system logs changes to detailed data in change documents which you can view in the activity documents on the Activity Documents tab page of the student file.

**Visiting Studies**

You can save data on visiting studies [Page 54] or exchange studies in infotype 1714 (Visiting Studies). The system logs data changes in change documents which you can view by choosing the Display Change Documents function key on the visiting studies detail screen.

1.2.6 Roles in Student Lifecycle Management

Use

Student Lifecycle Management contains predefined roles. A composite role, for example like assessment officer, represents specific university business processes, and also serves as an authorization to execute these business processes.

The system controls authorization by means of authorization profiles. You can either create authorization profiles manually, or automatically with the profile generator.

You assign authorization profiles to the respective users. Every user can be assigned more than one authorization profile. Each profile grants the user a number of authorizations.

Features

The following table lists the individual and composite roles in Student Lifecycle Management. The technical name of these roles begins with SAP_CM_*:

### Roles in Student Lifecycle Management

<table>
<thead>
<tr>
<th>Technical Name of Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CM_ADM_COORDINATOR [Page 156]</td>
<td>Composite role: Admission coordinator</td>
</tr>
<tr>
<td>SAP_CM_ADM_OFFICER [Page 157]</td>
<td>Composite role: Admission officer</td>
</tr>
<tr>
<td>SAP_CM_ASM_COORDINATOR [Page 157]</td>
<td>Composite role: Assessment coordinator</td>
</tr>
<tr>
<td>SAP_CM_ASM_OFFICER [Page 158]</td>
<td>Composite role: Assessment officer</td>
</tr>
<tr>
<td>SAP_CM_STREC_COORDINATOR [Page 158]</td>
<td>Composite role: Student records coordinator</td>
</tr>
<tr>
<td>SAP_CM_STREC_OFFICER [Page 159]</td>
<td>Composite role: Student records officer</td>
</tr>
</tbody>
</table>
This single role contains all authorizations for Student Lifecycle Management.

SAP_CM_ADMOFF_STUDYDATA
Single role: Activities for the admission officer

SAP_CM_ADMREGDATA_DISP
Single role: Display study data

SAP_CM_ASMOFF_ACT
Single role: Activities for the assessment officer

SAP_CM_ASMCO_ADDACT
Single role: Additional activities for the assessment coordinator

SAP_CM_ASMDATA_DISP
Single role: Display progression and grades

SAP_CM_STROFF_ACT
Single role: Activities for the student records officer

SAP_CM_STRCO_ADDACT
Single role: Additional activities for the student records coordinator

SAP_CM_STMASTERDATA_DISP
Single role: Display student master data

SAP_CM_STMASTERDATA_MAINT
Single role: Edit student master data

1.2.6.1 Admission Coordinator

Technical name: SAP_CM_ADM_COORDINATOR (composite role)

Tasks

The admission coordinator is responsible for managing the university’s admission process and ensuring its proper execution. He or she plans, controls and oversees the entire admission process, and evaluates the admission data. The admission coordinator delegates the individual tasks involved in the admission process to the admission officer [Page 157].

Notes on Tailoring

In the standard system, this composite role comprises the following single roles.

Single Roles of the Admission Coordinator

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CA_NO_NOTIF_GENERAL</td>
<td>General notification processing</td>
</tr>
<tr>
<td>SAP_CM_ADMOFF_STUDYDATA</td>
<td>Activities for the admission officer</td>
</tr>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
<td>Display study data</td>
</tr>
<tr>
<td>SAP_CM_STMASTERDATA_MAINT</td>
<td>Edit student master data</td>
</tr>
</tbody>
</table>

This composite role also contains the menu options for the following functions:

- Student file
- Edit student master data
- Edit notifications
- Determine equivalencies

Integration

The admission coordinator works together with the admission officer.
1.2.6.2 Admission Officer

Technical name: SAP_CM_ADM_OFFICER (composite role)

Tasks

The admission officer attends to the various tasks that are involved in the admission process. He or she checks the admission applications, enters admission data in the system, and creates the required correspondence. The admission officer reports to the admission coordinator [Page 156].

Notes on Tailoring

In the standard system, this composite role comprises the following single roles.

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CA_NO_NOTIF_GENERAL</td>
<td>General notification processing</td>
</tr>
<tr>
<td>SAP_CM_ADMOFF_STUDYDATA</td>
<td>Activities for the admission officer</td>
</tr>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
<td>Display study data</td>
</tr>
<tr>
<td>SAP_CM_STMASTERDATA_MAINT</td>
<td>Edit student master data</td>
</tr>
</tbody>
</table>

This composite role also contains the menu options for the following functions:
- Student file
- Edit student master data
- Edit notifications
- Determine equivalencies

1.2.6.3 Assessment Coordinator

Technical name: SAP_CM_ASM_COORDINATOR (composite role)

Tasks

The assessment coordinator is responsible for managing the university’s assessment process and ensuring its proper execution. He or she plans, controls and oversees the entire assessment process, which also includes the management of student appraisals, and control of the progression and graduation process. The assessment coordinator delegates the individual tasks involved in this process to the assessment officer [Page 158]. When creating reports, the assessment coordinator applies and evaluates the respective assessment data.

Notes on Tailoring

In the standard system, this composite role comprises the following single roles.

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
<td>Display study data</td>
</tr>
<tr>
<td>SAP_CM_ASMCO_ADDACT</td>
<td>Additional activities for the assessment coordinator</td>
</tr>
<tr>
<td>SAP_CM_ASMDATA_DISP</td>
<td>Display progression and grades</td>
</tr>
<tr>
<td>SAP_CM_ASMOFF_ACT</td>
<td>Activities for the assessment officer</td>
</tr>
<tr>
<td>SAP_CM_STMASTERDATA_DISP</td>
<td>Display student master data</td>
</tr>
</tbody>
</table>
This composite role also contains the menu options for the following functions:
- Student file
- Display student master data
- Edit requirement catalogs
- Edit assessments and assessment processes
- Determine progression
- Edit appraisals
- Edit graduation data
- Create admission and student correspondence

1.2.6.4 Assessment Officer
Technical name: SAP_CM_ASM_OFFICER (composite role)

Tasks
The assessment officer attends to the various tasks that are involved in the assessment process. The assessment process includes processing of student appraisals, and controlling of the progression and graduation process. The assessment officer checks the academic records, enters assessment data in the system, and creates the required correspondence. He or she reports to the assessment coordinator [Page 157].

Notes on Tailoring
In the standard system, this composite role comprises the following single roles.

Single Roles for the Assessment Officer

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
<td>Display study data</td>
</tr>
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<td>SAP_CM_ASMDATA_DISP</td>
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</tr>
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<td>Activities for the assessment officer</td>
</tr>
<tr>
<td>SAP_CM_STMASTERDATA_DISP</td>
<td>Display student master data</td>
</tr>
</tbody>
</table>

This composite role also contains the menu options for the following functions:
- Student file
- Display student master data
- Display requirement catalogs
- Edit assessments and assessment processes
- Determine progression
- Edit appraisals
- Edit graduation data
- Create admission and student correspondence

1.2.6.5 Student Records Coordinator
Technical name: SAP_CM_STREC_COORDINATOR (composite role)
Tasks

The student records coordinator is responsible for managing the university’s registration process and ensuring its proper execution. He or she plans, controls and oversees the entire registration process, including re-registration and progression of students from one level to another. He or she also delegates the individual tasks involved in this process to the student records officer [Page 159]. Furthermore, the student records coordinator evaluates the registration data.

Notes on Tailoring

In the standard system, this composite role comprises the following single roles.

Single Roles of the Student Records Coordinator

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
<td>Display study data</td>
</tr>
<tr>
<td>SAP_CM_ASMDATA_DISP</td>
<td>Display progression and grades</td>
</tr>
<tr>
<td>SAP_CM_STMASTERDATA_MAINT</td>
<td>Edit student master data</td>
</tr>
<tr>
<td>SAP_CM_STRCO_ADDACT</td>
<td>Additional activities for the student records coordinator</td>
</tr>
<tr>
<td>SAP_CM_STROFF_ACT</td>
<td>Activities for the student records officer</td>
</tr>
</tbody>
</table>

This composite role also contains the menu options for the following functions:

- Student file
- Edit student master data
- Determine equivalencies
- View requirement catalogs
- Edit assessments and assessment processes
- Determine progression
- Edit appraisals
- Edit graduation data

1.2.6.6 Student Records Officer

Technical name: SAP_CM_STREC_OFFICER (composite role)

Tasks

The student records officer attends to the various tasks that are involved in the registration process. The registration process includes the re-registration process and progression monitoring. The student records officer enters the registration data of students in the system. He or she reports to the student records coordinator [Page 158].

Notes on Tailoring

In the standard system, this composite role comprises the following single roles.

Single Roles for the Student Records Officer

<table>
<thead>
<tr>
<th>Technical Name of the Single Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP_CM_ADMREGDATA_DISP</td>
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<td>Activities for the student records officer</td>
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</tbody>
</table>
This composite role also contains the menu options for the following functions:

- Student file
- Edit student master data
- Determine equivalencies
- View requirement catalogs
- Edit assessments and assessment processes
- Determine progression
- Edit appraisals
- Edit graduation data

1.2.6.7 User Interface for Academic Advisor

A user interface (UI) is available for academic advisors in higher education institutions. The new Advisor UI provides services to academic advisors, that have been developed in Web Dynpro for ABAP. The advisor can use this new interface to access all the required functions from one single point of entry.

Features

Advisor Work Center

The Advisor Work Center contains the following functions:

- Advisor Work List
  - View all students at a glance
  - Perform a student quick search based on student name or student number
  - Perform a search for students based on criteria such as a student's program registration
  - Compile and customize reports for academic advising, such as BW queries and R/3 reports
  - Access multiple services for academic advising, such as simulation of equivalency determination
  - Navigate to the Student Info Center

- Student Info Center
  - Obtain an overview of student information, such as contact details, program of study and equivalency determination
  - View a detailed result for a single audit run
  - View a simulated equivalency determination result
  - Create or remove holds for a student
  - Write an advisory note containing information on an advising meeting
  - Customize the layout of the Student Info Center
  - Launch advising services for a student from the Student Info Center, such as building a module plan for the student. (*

*This function is only supported in the Enterprise Portal.

Advising Services

The following advising services are available:

- Simulation of equivalency determination

You can simulate equivalency determination for a current or prospective student. You can choose the external organization and external achievements of a student and obtain the result of simulated equivalency determination. The simulated result is not stored.
• Search transfer agreements

You can search for all transfer agreements from a particular external organization, or check how one internal or external academic achievement is acknowledged according to the transfer agreement.

• Build a module plan

You can propose the modules or event offerings that a student might book, in order to pass the degree audit requirements. They are derived from the student’s program and specializations.

During module planning, you can:

- Search for all modules and offers by name, program, or organizational unit, and check the search results for their capacity and the possibility of a time clash between modules
- Simulate module booking for the planned modules and offers
- Carry out an audit for the planned modules and offers, to check whether audit requirements are fulfilled
- Simulate an audit. You can build a simulated audit requirement profile for a student in any program and specialization, and execute an audit for the simulated profile.

The Advisor UI can also be used without the Enterprise Portal. You can run each part of the Advisor UI separately, for example, Advisor Work List, Student Info Center, and so on. Navigation is supported between the Advisor Work List and the Student Info Center.

1.3 Student Lifecycle Management Environment

The Student Lifecycle Management environment includes the following application components:

- Organizational Management
- Training and Event Management
- SAP Business Partners
- Quality Notifications
- Print Workbench
- Correspondence
- Personnel Administration

1.3.1 Integration of SAP NetWeaver Business Intelligence

Use

With SAP for Higher Education & Research and SAP NetWeaver Business Intelligence (SAP BI) you can flexibly evaluate given types of Student Lifecycle Management data.

SAP BI enables you to run evaluations and analyses on admissions, program registrations, and selected specializations for administration of students in Student Lifecycle Management. You can use queries to obtain information on the following issues:

- Number of rejected and admitted applications, and number of applications overall
- Number of registered students, and number of active registrations overall
- Ratio of applications to admissions or rejections, or ratio of admissions to rejections
- Ratio of female to male students
Notes on Implementation

You can make the required settings for data transfer in Customizing for *Student Lifecycle Management* under *Information Systems → Data Transfer from Student Lifecycle Management to the SAP BW*.

Features

The extractors for 3.5.3 business content retrieve the data for *Student Lifecycle Management* business content. These extractors enable you to transfer data from *Student Lifecycle Management* to *SAP BI* for OLAP reporting based on SAP or user-defined queries.

*Student Lifecycle Management* contains extractors for transaction data, master data, and texts. The extractors for the following objects support delta extraction:

- Students
- Study
- Admissions
- Registrations
- Specializations

Because of delta extraction, the system only transfers the data that has been changed from *Student Lifecycle Management* to *SAP BI*. All other extractors in this Business Content release do not support delta extraction because the other objects are ones with only slight data changes.

For more information about the different objects of *Higher Education & Research* business content, see the *SAP BI* documentation.

1.3.2 Integration of Records Management

Use

*Student Lifecycle Management* contains a minimum integration *SAP Records Management*.

Notes on Implementation

If you want to use *SAP Records Management* in *Student Lifecycle Management*, you must activate *Records Management* and make all the required settings. You can make these settings in Customizing for *Student Lifecycle Management* under *Student Lifecycle Management Master Data → Students → Integration of Records Management*.

You also have to set up *SAP Records Management*. Documents in *Records Management* are addressed by the anchor attribute. You can assign anchors to document types in Customizing for *Student Lifecycle Management*.

Features

You can create records for students in *Records Management* by branching to this application from the student file. Choose *Goto → Records Management* in the student file. If no record exists, the system asks you if you want to create one. If you answer the prompt with yes, the system will create a record in Records Management and then create a link between this record and the associated student business partner.

The system uses the transaction ORGANIZER to display and change records in *Records Management*.

When you run an admission audit, the system can check if a certain document exists in a *Records Management* record. You can implement this check in the condition of an index-independent subrequirement. If you want to run an existence check, you can use function module HRIQ_SRM_DOCTYPE_EXIST (*check if document is stored in the record*).
1.4 Country-Specific Functions

Purpose
In addition to generic functions, Student Lifecycle Management also offers certain country-specific functions. These are functions that are only used in a particular country and cover needs arising from local legislation or business practices. The following country-specific functions are delivered:

For the United Kingdom:
- UCAS Interface

For the United States:
- IPEDS Reporting
- Veterans Reporting
- 1098-T Reporting
- SEVIS Reporting
- NSCH Reporting

Integration
The country-specific functions listed above are contained within the Student Lifecycle Management component and are supplied as standard.

Features
The functions documented here are functions that are not otherwise covered by the generic Student Lifecycle Management functions. Student Lifecycle Management provides these additional functions to enable you to meet country-specific requirements.

1.4.1 United States

Purpose
This component is designed for use by universities in the United States. It comprises Student Lifecycle Management functions that are designed for laws and business practices particular to the United States. This documentation explains how the country-specific functions work and how to customize the system according to local requirements.

Features
The country-specific functions for the United States enable you to fulfill the legal requirements for student reporting in the US. You can prepare, execute, and output reports required for submission to the authorities.

1.4.1.1 IPEDS Reporting

Use
In the United States, universities are required to report various student data to the authorities. NCES (National Center for Education Statistics) uses the Integrated Postsecondary Education Data System (IPEDS) to collect this data from post-secondary institutions. IPEDS consists of various components to fulfill the different reporting requirements. Student Lifecycle Management currently supports three of these components and comes with reports that you can use to compile the data required.

Features
The Student Lifecycle Management IPEDS Reporting solution covers the following three reports:
**Completions Report** – Reports the number and composition of students who complete a post-secondary education program. Degree completions are reported by level, length of program, race/ethnicity, gender, and CIP code.

**Fall Enrollment Report** – Reports the number and composition of students who are currently enrolled. Full-time and part-time student enrollments are reported by level, race/ethnicity, and gender.

**Graduation Rate Survey Report** – Reports the number and composition of students who graduate or transfer out. Graduation rates and transfer rates are reported for the cohort (full-time, first-time, degree/certificate-seeking undergraduate students in a specific year) by race/ethnicity and gender. Data on students receiving athletically-related financial aid is also collected.

### Prerequisites

#### Master Data

Before you can use the IPEDS reporting solution, you have to maintain the following master data on the SAP Easy Access screen:

- Assign your IPEDS Unit ID to an organizational ID, by choosing **Student Lifecycle Management** → **Environment** → **Organizational Management** → **Expert Mode** → **General**. Here, select **Organizational Unit** as the **Object Type** and use the search help to search for your organizational unit. Select **Identification Number** as the corresponding **Info Type** and choose **Create**. Select **US Legal: OrgID Assignment** as the **Category of Org ID** and enter the IPEDS unit ID for your institution. Save your entries.

- Create an academic calendar, by choosing **Student Lifecycle Management** → **Academic Structure (Curriculum)** → **Study Planning** → **Academic Structure**.

#### Customizing

You also have to make the following Customizing settings in Customizing for **Student Lifecycle Management**:

- Carry out the IMG activities, activate the BC set and, if necessary, implement the BAdI, by choosing **Country-Specific Settings** → **United States** → **IPEDS Reporting**.

- Create a selection method, and subsequently assign it to the selection method group /US1, by choosing **Student Lifecycle Management Processes** → **General Settings** → **Selection Methods** → **BAdI: Selection Method**.

- Specify the standard duration of academic sessions in the academic calendar by defining time limit 0100, by choosing **Student Lifecycle Management Master Data** → **Academic Calendars** → **Define Time Limits**.

- Indicate first-time students for admission categories, by choosing **Student Lifecycle Management Processes** → **Admission, Registration, and De-registration** → **Admission** → **Set Up Admission Categories**.

In addition, you have to make the following setting in Customizing for **Financial Accounting** (FI):

- Define numeric codes for the US state codes by setting up country region codes, by choosing **Financial Accounting Global Settings** → **Tax on Sales/Purchases** → **Basic Settings** → **Provincial Tax Codes** → **Define Fiscal Regional Codes for Other Countries**.

Finally, you have to make the following setting in Customizing for **Cross-Application Components**:

- Define the physical file path indicating where the logical file created by the report is to be stored, by choosing **Document Management** → **Document Distribution** → **General Settings** → **Platform-Independent File Names** → **Maintain file names and file paths across all clients**. The following details are predefined:
  - Logical file name – ISHERCM_US_IPEDS_FILENAME
  - Logical file path – ISHERCM_US_IPEDS
  - Physical file name – IPEDS<PARAM_1>.<PARAM_2>
Procedure

To access the IPEDS Reporting solution, on the SAP Easy Access screen, choose Student Lifecycle Management → Country-Specific Functions → United States → IPEDS Reporting.

To run the reports, proceed as follows:

6. Select the corresponding radio button for the required report.
7. Enter your organizational ID, as defined above under Master Data.
8. If you want to report certain students only, select the Selected Student Reporting checkbox and choose the selection method you created above under Customizing.
9. Choose the pushbutton for the relevant report.
   The selection options for that report are displayed.
10. Enter the relevant reporting dates, and indicate what information is to be reported by selecting the corresponding checkboxes as required.
11. Select your preferred output option.
   If you choose to download the file, the File Transfer box appears. Select whether you want to download the file to the presentation server or the application server, and enter the file path and parameter.
12. Choose Execute.
   A new screen appears, displaying the information requested for the students selected. Here, you can view more information for each student listed by choosing the Details button, or you can choose the Display Errors pushbutton to view the error log, for example.

After reviewing the list of data output in the format specified (as a text file if it is to comply with the legal requirements), you can then submit the file to the relevant authorities.

1.4.1.2 Veterans Reporting

Use

In the United States, students who are veterans or dependents of veterans are entitled to financial benefits for education. To receive such benefits, the university’s certifying official has to complete an enrollment certification (form 22-1999) for the student, based on their application form, and submit this to the Regional Veterans Office, which then issues the payment. Student Lifecycle Management comes with a report that you can use to compile the data required for this enrollment certification.

Prerequisites

Before you can use the Veterans Reporting solution, you have to carry out the IMG activities, activate the BC set and, if necessary, implement the BAdI in Customizing for Student Lifecycle Management, by choosing Country-Specific Settings → United States → Veterans Reporting.

If you do not implement the BAdI, you have to configure the system so that it can derive the student’s facility code from the object relationships. To do this, on the SAP Easy Access screen, choose Student Lifecycle Management → Environment → Organizational Management → Expert Mode → General. Here, select Location as the Object Type and use the search help to search for your location. Select Identification Number as the corresponding Info Type and choose Create. Select US Legal: Campus Assigned as the Category of Org ID and enter the Org ID Number (facility code) for your institution. Save your entries.

Finally, before running the Veterans report, you also have to define the physical file path indicating where the logical file created by the report is to be stored. To do this, in Customizing for Cross-Application Components, choose Document Management → Document Distribution → General Settings → Platform-Independent File Names → Maintain file names and file paths across all clients. The following details are predefined:

- Logical file name – ISHERCM_US_VETERANS
- Logical file path – ISHERCM_US_VETERANS
- Physical file name – VA<student number><date and time>.<file extension>
Procedure


14. Enter the student number. The Student Academic Selection box is displayed.

15. Select the academic year and session. The Overview, Program/Enrollment Data, and Certification tab pages appear.

16. On the Overview tab, the student details are defaulted. Select the student’s address for correspondence.

17. On the Program/Enrollment Data tab, the programs and modules for which the student is registered are defaulted. Select the program of study and modules for which the student is to avail veterans benefits.

18. Select the relevant course type for the modules selected.

19. On the Certification tab, the school addresses are defaulted. Enter the certifying official’s details.

20. Choose the Check Inputs for Veterans Reporting button and display the message log. If you do not carry out this step and subsequent error messages occur, the download will not initiate.

21. Choose the Download Form to Application Server button and/or print the form by choosing the Print button.

You can then review the data and submit the form to the authorities.

1.4.1.3 1098-T Reporting

Use

In the United States, educational institutions are required to issue a tuition statement containing details about tuition fees and related expenses to be paid by students to enroll in or attend a program of study, and any grants or scholarships awarded to students for the payment of these costs.

This report enables you to report the net amounts billed for tuition and related expenses and the value of scholarships and grants awarded, as well as adjustments made to these amounts for the current and previous year, for selected students. You can then print this information and send it to the authorities.

Prerequisites

Customizing

You have to make the following settings in Customizing for Student Lifecycle Management:

- Carry out 1098-T specific settings in Customizing for Student Lifecycle Management, by choosing Student Lifecycle Management → Country-Specific Settings → United States → 1098-T Reporting.

Ensure that you configure the following customizing entries, since they are valid for 1098-T reporting from the year 2007 onwards:

- Map Period Keys to Reporting Year
- Map Relevant Prior Reporting Years to Reporting Year
- Maintain Valid 1098-T Application Form
- Define Graduate and Undergraduate Program Types
- Define Performance Index for Full Time Credit Load
- Define Business Partner ID Type and Address Type
- Create a selection method, and subsequently assign it to the selection method group /US1, by choosing **Student Lifecycle Management** → **Student Lifecycle Management Processes** → **General Settings** → **Selection Methods** → **BAdI: Selection Method**.

  ![Tip]

  This Selection Method is used to determine the set of students that you wish to process. You should ensure that you only select U.S. Resident students (as determined by your institution), and that you also only select students with relevant academic enrollment.

- Define, and subsequently assign, fee calculation periods, by choosing **Student Lifecycle Management** → **Student Accounting** → **Basic Settings** → **Fee Calculation Periods**.

- Define Fee Calculation Periods and Assign Academic Years and Sessions to Fee Calculation Periods.

- Define posting settings for fees, by choosing **Student Lifecycle Management** → **Student Accounting** → **Fees** → **Posting**.

- Define posting settings for grants, by choosing **Student Lifecycle Management** → **Student Accounting** → **Sponsoring** → **Posting**.

You also have to make the following setting in Customizing for Cross-Application Components:

- Define the physical file path indicating where the logical file (ISHERCM_US_1098T) created by the report is to be stored, by choosing **Document Management** → **Document Distribution** → **General Settings** → **Platform-Independent File Names** → **Maintain file names and file paths across all clients**.

**Procedure**

On the **SAP Easy Access** screen, choose **Student Lifecycle Management** → **Country-Specific Functions** → **United States** → **1098-T Reporting**.

The system displays the US Legal reporting: 1098T-Tuition Statement for IRS-US selection screen.

1. Enter the reporting year in the relevant field.
   In the Selection Method, select the selection method you maintained in the Customizing, if you want to report selected students only.

2. Enter the reporting year in the relevant field. In Selection Variant, select the variant by clicking the variant icon.

3. Enter the reporting year in the relevant field. Choose Transmitter.
   The system displays the Transmitter section.

4. In the Transmitter section, enter the Transmitter control and Transmitter TIN, and select the Foreign Entity Indicator if the student(s) is a foreign national. The system displays the contact details of your institution.

5. Choose **Payer/Transfer Agent**
   The system displays Payer/Transfer Agent section. In this section, enter the required information for your institution.

6. Choose **Record File Properties**
   The system displays the Record File Properties section. In this section, select the required file type, and enter the Alpha Replacement Co, if you want to create a replacement file. Also enter the IRS file name.

7. Choose **Output Options**.
   The system displays the **Output Options** screen. On this screen, select:

   - **List Display** to list student details in a single row
   - **Create File** to save the data
When you select this indicator, the system displays the following options:

- **Presentation Server**
  Select this indicator to save data on the local system. You must also enter the location where the report must store the file. You can submit this file to the government and keep it for your future reference.

- **Application Server**
  Select this indicator to save data on a server. You must also specify the file parameters.

  - **Print form** to specify the parameters for storing the printable version of the 1098-T form. When you select this indicator, the system displays the following options:

    - **File Path**
      Enter the path to the location where the report must store the generated 1098-T form. The report generates the 1098-T form in a .pdf format.

    - **Sequence Number for PDF document**
      Enter the path to the location where the report must store the run number of the report. The report tracks the number of times the 1098-T form was generated using sequence numbers.

8. **Choose Execute.**

The system runs the report and outputs the data in accordance with the output option selected. If you choose the display the data, the **Student Overview Listing** screen appears. The filer and student contact details are defaulted for the selected students in ALV list format and you can download the form, view the student details for the tuition statement, display the error log, or print the data in a flat file by choosing the corresponding buttons.

You can then review the data and submit the form to the authorities.

### 1.4.1.4 SEVIS Reporting

**Purpose**

In the United States, educational institutions are required to report details about foreign students, exchange visitors, and their dependents to the authorities. SEVIS (Student and Exchange Visitor Information System) is an Internet-based application developed by the US Department of Home Security (DHS) to facilitate this. The SAP SEVIS Reporting solution enables you to create and update student and exchange visitor records, as required, and to subsequently create an XML file containing this information as per the XML schema provided by SEVIS. You can then send this XML file to SEVIS using a third-party tool (upload/download of XML files to the SEVIS Website is not supported by this solution). The SEVIS Reporting solution consists of the following two reports:

- [Create/Update Student Records](#)
- [Create/Update Exchange Visitor Records](#)

#### 1.4.1.4.1 SEVIS Student Reporting

**Use**

In the United States, educational institutions are required to report details about foreign students and their dependents to the authorities. SEVIS (Student and Exchange Visitor Information System) is an Internet-based application developed by the US Department of Home Security (DHS) to facilitate this. The SAP SEVIS Student Reporting solution enables you to create and update student records, as required, and to subsequently create an XML file containing this information as per the XML schema provided by SEVIS. You can then send this XML file to SEVIS using a third-party tool (upload/download of XML files to the SEVIS Website is not supported by this solution).
Prerequisites

Before you can use the SEVIS Student Reporting solution, you have to make the following Customizing settings:

- Carry out the IMG activities and activate the BC set in Customizing for Student Lifecycle Management, by choosing Country-Specific Settings → United States → SEVIS Reporting → General Settings and Student Reporting.
- Create a selection method, and subsequently assign it to the selection method group /US1, in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Processes → General Settings → Selection Methods → BAdI: Selection Method.
- Define the physical file path indicating where the logical file (ISHERCM_US_SEVIS_STUDENT) created by the report is to be stored, in Customizing for Cross-Application Components by choosing Document Management → Document Distribution → General Settings → Platform-Independent File Names → Maintain file names and file paths across all clients.

You also have to maintain the following master data:

- Assign your SEVIS school code to an organizational ID on the SAP Easy Access screen, by choosing Student Lifecycle Management → Environment → Organizational Management → Expert Mode → General. Here, select Organizational Unit as the Object Type and use the search help to search for your organizational unit. Select Identification Number as the corresponding Info Type and choose Create. Select US Legal: OrgID Assignment as the Category of Org ID and enter the SEVIS school code for your institution. Save your entries.
- Create a port under XML File on the SAP Easy Access screen, by choosing Tools → Business Communication → IDoc Basis → Administration → Port Definition. Here, assign the file path ISHERCM_US_SEVIS_STUDENT as the logical directory. If required, also enter your own function module for deriving a naming convention logic for the file name. Save your entries.
- Create a partner profile under Partner Type LS on the SAP Easy Access screen, by choosing Tools → Business Communication → IDoc Basis → Administration → Partner Profile. Here, assign the message type PIQ_US_SEVIS and choose the Detail Screen button. Assign the XML port you created as the receiver port. Select Transfer IDoc immed. as the output mode, and enter PIQ_US_SEVIS_STCREATE as the basic type in the IDoc Type box. Save your entries.

Procedure

10. Enter the organizational unit ID for your institution, as defined under Prerequisites.
11. Enter the date range during which foreign students enrolling at the institution are to be reported.
12. Select the selection method you created under Prerequisites, if you want to report selected students only.
13. Enter the required header data.
14. Select one or both of the processes (Create and/or Update Student Records), depending on your requirements. You then have the option of requesting a new Form I-20 for the students and are requested to enter your user ID and, if you are creating new records, the relevant academic term.
15. Choose Execute.
   A new screen appears with a Create tab page and an Update tab page. A list of those students satisfying the selection criteria is displayed in ALV format on the relevant tab page.
16. Select students in the list as required and choose the Display Consolidated Data button.
   A split screen appears displaying the consolidated data for the selected students whose files are to be created and/or updated.
17. Choose the Generate XML File button.

After generating a file, you have to format this file before sending it to SEVIS. To do this, on the SAP Easy Access screen, choose Student Lifecycle Management → Country-Specific Functions → United States →
SEVIS Reporting → Student XML File Processing. Here, select the appropriate options and enter the path names required. Choose Execute. You can then upload the formatted XML file to SEVIS.

1.4.1.4.2 SEVIS Exchange Visitor Reporting

Use

In the United States, educational institutions are required to report details about exchange visitors to the authorities. SEVIS (Student and Exchange Visitor Information System) is an Internet-based application developed by the US Department of Home Security (DHS) to facilitate this. The SAP SEVIS Exchange Visitor Reporting solution enables you to create and update exchange visitor records, as required, and to subsequently create an XML file containing this information as per the XML schema provided by SEVIS. You can then send this XML file to SEVIS using a third-party tool (upload/download of XML files to the SEVIS Website is not supported by this solution).

Prerequisites

Before you can use the SEVIS Exchange Visitor Reporting solution, you have to make the following Customizing settings:

- Carry out the IMG activities in Customizing for Student Lifecycle Management, by choosing Country-Specific Settings → United States → SEVIS Reporting → General Settings and Exchange Visitor Reporting.

- Create a selection method, and subsequently assign it to the selection method group /US1, in Customizing for Student Lifecycle Management by choosing Student Lifecycle Management Processes → General Settings → Selection Methods → BADI: Selection Method.

- Define the physical file path indicating where the logical file (ISHERCM_US_SEVIS_STUDENT) created by the report is to be stored, in Customizing for Cross-Application Components by choosing Document Management → Document Distribution → General Settings → Platform-Independent File Names → Maintain file names and file paths across all clients.

You also have to maintain the following master data:

- Assign your SEVIS program number to an organizational ID on the SAP Easy Access screen, by choosing Student Lifecycle Management → Environment → Organizational Management → Expert Mode → General. Here, select Organizational Unit as the Object Type and use the search help to search for your organizational unit. Select Identification Number as the corresponding Info Type and choose Create. Select US Legal: OrgID Assignment as the Category of Org ID and enter the SEVIS program number for your institution. Save your entries.

- Create a port under XML File on the SAP Easy Access screen, by choosing Tools → Business Communication → IDoc Basis → Administration → Port Definition. Here, assign the file path ISHERCM_US_SEVIS_STUDENT as the logical directory. If required, also enter your own function module for deriving a naming convention logic for the file name. Save your entries.

- Create a partner profile under Partner Type LS on the SAP Easy Access screen, by choosing Tools → Business Communication → IDoc Basis → Administration → Partner Profile. Here, assign the message type PIQ_US_SEVISEV and choose the Detail Screen button. Assign the XML port you created as the receiver port. Select Transfer IDoc immed. as the output mode, and enter PIQ_US_SEVIS_EV1 as the basic type in the IDoc Type box. Save your entries.

Procedure


19. Enter the organizational unit ID for your institution, as defined under Prerequisites.

20. Enter the date range during which exchange visitors enrolling at the institution are to be reported.

21. Select the selection method you created under Prerequisites, if you want to report selected exchange visitors only.
22. Enter the required header data.
23. Select one or both of the processes (*Create and/or Update Exchange Visitor Records*), depending on your requirements. You then have the option of requesting a new Form I-20 for the exchange visitors and are requested to enter your user ID.
24. Choose *Execute*.
   A new screen appears with a *Create* tab page and an *Update* tab page. A list of those exchange visitors satisfying the selection criteria is displayed in ALV format on the relevant tab page.
25. Select exchange visitors in the list as required and choose the *Display Consolidated Data* button.
   A split screen appears displaying the consolidated data for the selected exchange visitors whose files are to be created and/or updated.
26. Choose the *Generate XML File* button.
   After generating a file, you have to format this file before sending it to SEVIS. To do this, on the *SAP Easy Access* screen, choose *Student Lifecycle Management* → *Country-Specific Functions* → *United States* → *SEVIS Reporting* → *Exchange Visitor XML File Processing*. Here, select the appropriate options and enter the path names required. Choose *Execute*. You can then upload the formatted XML file to SEVIS.

### 1.4.1.5 NSCH Reporting

**Use**

In the United States, educational institutions are required to report specific data regarding the enrollment status of students to the National Student Clearing House. The National Student Clearing House (NSCH) is a private organization governed by a board of directors comprising of representatives from educational institutions, guarantors, and lenders. It aims to facilitate reporting by universities to student loan industry participants and to the Government. The NSCH collects data on both students and sponsors, which can subsequently be used to facilitate the administration of granting student loans, as well as for reference purposes when students are applying for employment or further courses of study.

The NSCH offers various services to fulfill different reporting requirements. Student Lifecycle Management currently supports two of these services and comes with reports that you can use to compile the data required. The Student Lifecycle Management NSCH Reporting solution covers the following two services:

- Core Services
- Degree Verify

For more information, see [NSCH Core Services Reporting](Page 171) and [NSCH Degree Verify Reporting](Page 172).

#### 1.4.1.5.1 NSCH Core Services Reporting

**Use**

The NSCH Core Services Reporting solution enables you to compile the data required for student reporting purposes. You can use the *CM US National Student Clearing House Legal Reporting* report to view or download enrollment data for students, which you can subsequently transmit to NSCH, as required.

**Prerequisites**

Before you run the *CM US National Student Clearing House Legal Reporting* report for core services, you have to have maintained the student master data and academic data as usual, and also carried out the IMG activities in Customizing for *Student Lifecycle Management* by choosing *Country-Specific Settings* → *United States* → *NSCH Reporting*.

**Procedure**

27. On the *SAP Easy Access* screen, choose *Student Lifecycle Management* → *Country-Specific Functions* → *United States* → *NSCH Reporting* → *NSCH Core Services*.
28. Enter the organization unit ID for your institution.
29. Select the **Student Reporting** checkbox if you want to restrict the report selection to specific students only.

30. Enter the enrollment start and end date to define the date range during which students are enrolled at the institution in order to be included in the reporting.

31. Enter the relevant academic year and session for reporting.

32. Select the **Standard Report** checkbox if the reporting period is a standard term. If you have agreed with NSCH to transmit data at other intervals, do not select this checkbox.

33. In the **Report Output** dialog box, select whether you want the system to display the output in a list and/or to generate a file, which can be downloaded either to the presentation server and application server, as specified.

34.

35. You can then send the data to NSCH, according to the transmission schedule that you have agreed.

### 1.4.1.5.2 NSCH Degree Verify Reporting

**Use**

The NSCH Degree Verify Reporting solution enables you to compile the data required for student reporting purposes. You can use the **CM US National Student Clearing House Legal Reporting** report to view or download data regarding conferred degrees, which you can subsequently transmit to NSCH, as required.

**Prerequisites**

Before you run the **CM US National Student Clearing House Legal Reporting** report for degree verify, you have to have maintained the student master data and academic data as usual, and also carried out the IMG activities in Customizing for **Student Lifecycle Management** by choosing **Country-Specific Settings → United States → NSCH Reporting**.

**Procedure**

36. On the **SAP Easy Access** screen, choose **Student Lifecycle Management → Country-Specific Functions → United States → NSCH Reporting → NSCH Degree Verify**.

37. Enter the organization unit ID for your institution.

38. Select the **Student Reporting** checkbox if you want to restrict the report selection to specific students only.

39. Enter the conferment start and end date to define the date range during which students have to have received their degree at the institution in order to be included in the reporting.

40. Enter the relevant academic year and session for reporting.

41. Select the **Standard Report** checkbox if the reporting period is a standard term. If you have agreed with NSCH to transmit data at other intervals, do not select this checkbox.

42. In the **Report Output** dialog box, select whether you want the system to display the output in a list and/or to generate a file, which can be downloaded either to the presentation server and application server, as specified.

You can then send the data to NSCH, according to the transmission schedule that you have agreed.

### 1.5 Higher Education & Research Business Package

**Use**

The **Higher Education & Research 1.0** business package contains the portal role **university instructor** and Web Dynpro (WD) applications for appraisal self-service.

**Prerequisites**

In order to be able to use this business package, you need a Web Application Server (WAD) on which a portal and J2EE server is installed. You also need an SAP system on which Student Lifecycle Management is installed.
Features

This business package enables instructors to fulfill the appraisal tasks which are assigned to them. Instructors can obtain an overview of the appraisal tasks entrusted to them per academic offering and academic period. For each academic offering, instructors can display the registered students and the associated appraisal-relevant data. They can also display and change the appraisal results of each student.

Instructors can run the appraisal process for their appraisal tasks. The system displays all of the assigned students and their appraisal results. The system guides instructors through the entire appraisal process for each academic offering. The appraisal process itself is split into small, logical steps. Users can define which tasks they want to perform in the current step and which ones they want to complete in subsequent steps.

Activities

Before you can use this business package, you must perform the following activities:

- Import the business package into the portal. You can download the business package from the SAP Service Marketplace.
- In the portal, create an SAP system object with the system alias SAP_HER. The SAP system object must be linked to the SAP system on which Student Lifecycle Management runs.
- In the J2EE server, use the software component archive (SCA) for the components SAPPCUI_GP and IS-HER-CSS. Configure the following destinations of the SAP Java Connector (JCo) in the J2EE server:
  - SAP_HER
  - SAP_HER_MetaData
  - SAP_R3_HumanResources
  - SAP_R3_HumanResources_MetaData
  - SAP_R3_HumanResources
  - SAP_R3_HumanResources_MetaData
  - SAP_R3_HumanResources_MetaData
  - Configure these JCo destinations for the Student Lifecycle Management system in the single sign-on (SSO) mode.
- Create a user in the portal and J2EE server for every appraiser who uses the appraisal self-service application. Assign these users the portal role “university instructor” in the portal.
- Make the required backend settings in the Student Lifecycle Management system to start the appraisal process.
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