Business Process Procedures

9.10 SET UP COURSE LIST

Overview
These procedures walk an operator through the step-by-step process of setting up a course list to be used by third party contracts.

Key Points
Course Lists are used when setting up third party contract when the third party type “Specific Course Lists” is selected. There are three types of course lists:

1. a specific course list – used when an employer will pay for the same course(s) for all employees covered by the contract.
2. a generic course list – used with a “dummy” course to ready the contract to accept a student course list.
3. a student course list – used when an employer will pay for specific course(s) for the students covered by the contract, but each student’s covered course(s) may be different.

Navigation
Home > Set Up SACR > Product Related > Student Financials > Course and Class Fees > Course Lists

Detailed Directions

Step 1
Navigate to Course List page. A dialog window appears.

Course Lists
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

SetID: NV280
Course List: begins with

Include History  Correct History

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Step 2
Click Add a New Value.

Accept NV280 as the default SetID.

Enter a course list name using the following naming convention. (This field must be numeric.)

If you are setting up a list for a specific student, use the student’s EmplID.
If you are setting up a list for a specific course, use the class number.
Note
It is very important to adhere to the course list naming convention. If all course list names are set up the same way, it will be much easier to find the appropriate list.

Step 3
Click **Add**. The following page appears.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description/Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date</td>
<td>Accept the current date as the default effective date. Note: It may be necessary to insert a new effective date row so the course list can be updated and used for the new term’s contract.</td>
</tr>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description. For a student course list, enter the student’s Empl ID and name (last name, first). For specific course list, enter the contract number the course list will be attached to.</td>
</tr>
<tr>
<td>Short Description</td>
<td>Enter a short description or accept the default.</td>
</tr>
<tr>
<td>Long Description</td>
<td>Accept the long description default or change it to a description that will fully describe the course list to anyone else reviewing the panel</td>
</tr>
<tr>
<td>Sequence Nbr</td>
<td>Enter a Sequence Nbr (number). This is a required field. Start with 1. It is not possible to duplicate sequence numbers within one course list.</td>
</tr>
<tr>
<td>Course ID</td>
<td>If you know the Course ID, enter it in this field. If you do not know the ID, follow the instructions in the Note below. To enter more courses, place your cursor in the Course ID field and click <strong>Add</strong> to insert an additional row.</td>
</tr>
<tr>
<td>WildCard Indicator</td>
<td>Click the WildCard ☐ if creating a list of courses with ‘like’ characteristics. When the WildCard ☐ is checked, the Institution, Acad Group, and Subject fields become available.</td>
</tr>
</tbody>
</table>

Step 4
Enter the information as listed below. Use the tab key to move between fields.
To create a list that includes courses with like characteristics and courses with unique characteristics, do not select the WildCard on rows referencing a single course. Simply enter the Course ID for these rows.

<table>
<thead>
<tr>
<th>Institution</th>
<th>This field becomes available when the WildCard Indicator box is checked. Enter NV280.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acad Group</td>
<td>This field becomes available when the WildCard Indicator box is checked. Enter the appropriate value.</td>
</tr>
<tr>
<td>Subject</td>
<td>This field becomes available when the WildCard Indicator box is checked. Enter the appropriate value.</td>
</tr>
</tbody>
</table>

**Note**

Click [ ] to look up the Course ID. A valid values dialog box appears.

### Look Up Course ID

- **Course ID:** begins with
- **Description:** begins with
- **Academic Institution:** begins with
- **Academic Group:** begins with
- **Subject Area:** begins with
- **Catalog Info:** begins with

- [Look Up]
- [Clear]
- [Cancel]
- [Basic Lookup]

### Search Results

Enter NV280 as the Academic Institution.

Enter the Academic Group.

Enter the Subject Area.

Click [ ] to narrow the search to the correct subject.

Click on hyperlink for the proper course.

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**Step 5**

Click [ ].