HOW TO VIEW OR CREATE CURRICULUM RULES IN BANNER SIS
Curriculum Rules Form (SOACURR)

General:

The *Curriculum Rules Form* is used to view, create or modify create curriculum rules associated with each academic program.

Curriculum Rule Definition: The rules which permit only specified majors and their attached concentration and minors to be updated on a student's record.

Check List:

When Querying SOACURR: it is useful to obtain the Program name from SMAPRLE.

When Updating SOACURR:
1. Obtain the Program name from SMARPLE.
2. Determine whether the program should create a degree record in Academic History (i.e. a student can graduate from this program).
3. Confirmation that the Program and its components are valid for admissions, registration, academic history, and CAPP

Appendix A - Academic Program Types

Appendix B - Standards for Searching for Categories of Programs

Appendix C - Legend for Descriptions Major and Minor Codes

Remember: The bottom left of the form displays errors and warnings. This area is referred to as the auto-hint line and should be consulted if you are experiencing any problems. Even if you are not experiencing difficulties you should always keep an eye on this bar, especially if you are updating fields, as it provides important information such as warnings and errors that do not necessarily block your progress.

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Accessing the "Curriculum Rules Form" (SOACURR)

Type the name of the form SOACURR in the Direct Access field. The adjacent screen will appear:

The form is automatically in query mode and can be searched on fields such as term, program, level, campus, college, degree, P (primary), S (secondary) and Lock.

WARNING: When updating be sure to cancel *query mode* before updating record.

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	Term	Enter 6-digit term code or leave blank for curriculum rules for all terms. Double click in Term field for list of valid terms.	If term is defined, only the rules in effect for a specific term will be displayed. If no term is entered, the curriculum rules for all terms are displayed (based on any additional query criteria that have been entered).	Term codes consist of the calendar year and month when that term normally commences. For example, the term code for Fall 2002-2003 will be 200209 (year 2002, month 09 September).	Validation Table referenced: Term Code Validation Table (STVTERM)
✔			Proceed to the Next Block by clicking on the Next Block icon in your			

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			toolbar or by pressing Ctrl + Page down on your keyboard.			
✔			**To Query:** The form is entered in query mode and can be searched on term, program, level, campus, college, degree, P (primary), S (secondary) and Lock. Enter criteria and click on Execute Query icon or press F8 to obtain results. **Important when Updating:** Cancel Query by clicking cancel query icon or Ctrl-q.			
	2.	Not used.				
	3.	Base Rule			Sequential number assigned automatically to each program when program data has been entered and saved in this window.	
	4.	Program	**To search for code in query mode**: Double click in Program field for List of Options.		Program Code. Please refer to Appendix A for description of Program types.	The program must exist on SMAPRLE before a curriculum rule can be created in SOACURR. SOACURR checks with the Program Definition Form (SMAPRLE) when attaching a program to a rule.

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	5.	Level	**To search for code in query mode:** Double click in Level field for a list of valid codes.		Code attached to Program. Used to drive GPA, credit counting, some registration restrictions, grade modes and fee assessment. Most undergraduate faculties have been assigned the same level (UG Undergraduate) except Dentistry, Medicine and Law. Programs administered by Graduate Studies have been divided into several different levels, due to fee assessment needs.	Must match the values existing in the Program Definition Form (SMAPRLE). Validation Table referenced: Level Code Validation (STVLEVL)
	6.	Campus	**To search for code in query mode:** Double click in Campus field for list of valid campus codes.		Blank if the curriculum rule could be valid for more than one campus. A campus code is displayed when the program is considered private regardless of the student's residency. Note: This component can be added but cannot be deleted or changed after the base rule has been saved, even if no person has been attached to a rule.	Validation Table referenced: Course Validation (STVCAMP)
	7.	College	**To search for code in query mode:** Double click in College for a list of valid college codes.		Code attached to Program. Codes for Faculties, Schools, Graduate Studies and the Centre for Continuing Education.	Must match the values existing in the Program Definition Form (SMAPRLE). Validation Table referenced: College Validation (STVCOLL)

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	8.	Degree	**To search for code in query mode:** In query mode (F7), double click double click in Degree field for List of valid degree codes.		Code attached to Program.	Must match the values existing in the Program Definition Form (SMAPRLE). Validation Table referenced: Code Validation (STVDEGC)
	9.	Term			Indicates the date that the curriculum rule becomes effective. The term cannot be changed after a curriculum rule is saved.	Validation Table referenced: Term Validation (STVTERM)
	10.	P			Primary Curriculum: If checked creates a degree record for primary curriculum.	
	11.	S			Secondary Curriculum: If checked creates a degree record for secondary curriculum.	
	12.	Lock			The lock indicator should be checked when the curriculum rule is completely defined, finalized and available (base rule saved and all appropriate attachments and module controls are saved). When a rule is not locked, the rule is not available for curriculum checking. This means that a record that makes use of an unlocked rule will fail curriculum checking. Note: Changes/additions can be made after the rule is locked. When a rule is locked, it is a valid rule, which will be enforced by curriculum checking.	
	13.	Module Control	Click Module Control icon to access Module Control window for			

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			selected Program.			
	14.	Majors	Click Majors icon to access Majors/Department Rules window for the selected Program.		Attached to Program.	
	15.	Concentrations	Note: McGill will not be using concentrations attached at the program level. To view Concentrations see Majors window below, page 10.		All Concentrations are attached to majors.	
	16.	Minors	Click on Minors icon to access Curriculum Minors window for the selected Program.		Attached to Program.	

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Module Control Window

The base rule and rule number for the base rule high lighted on the Curriculum Rules Form, are displayed in the key block (top section of the window).

Module control rules can be defined for each base curriculum rule for each module. They can be defined by effective term and so can be changed over time.

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	From Term	Double click to access Option List: **To Query:** Display Existing Rules (Module Controls for Existing Terms): Effective term can be picked from the list and will be entered in the From Term field	**Display Existing Rules** (accessed via From Term) Displays all the terms that have been created as effective terms. The next effective term in the list (which is displayed in term numerical order) will be	Beginning module control effective term. Initially the effective term that has been set for the curriculum rule in the Curriculum Rules Form Window is displayed. No From Term prior to the curriculum rule effective term on the main SOACURR window can be indicated. When more than one effective	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			Updating only: Copy Current Rule: (Module controlCopy: Effective Terms): Effective Terms Window) Allows a new effective term to be created for a base rule.	system generated in the To Term. When there is no next effective term in the list, 999999 (End of Time) is generated. **Copy Current Rule** (accessed via From Term) All existing terms after the term displayed in From Term, with the exception of any terms which are already on the Display Existing Rules list, can be chosen from a list. When a term is chosen from a pick list; the term will be displayed in the From Term field and will be entered in the Display Existing Rules list of terms.	term exists, the message Multiple Effective Terms is displayed.	
	2.	To Term	Display only.		Ending module control effective term. Value of 999999 (end of time) is system generated until a new effective term is created; then the effective term for the new rule becomes the To Term for the old rule. Rules are effective from and including the "From Term" until but excluding the displayed "To Term".	
	3.	On			On – if base rule is valid for that module	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	4.	Off			Off – if base rule is not valid for that module	

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Majors/Department Rules Window

The base rule and the From and To Terms for the Base Curriculum Rule are displayed in the key block of the window.

If majors or minors have been attached to a base curriculum rule or if concentrations have been attached to a major, then no other majors, minors, or concentrations can be attached to a student's record (given curriculum checking).

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	From Term	Double click to access Option List: **To Query:** Select <u>Display Existing Rules</u> : Effective term can be picked from this list and will be displayed in the From Term field.	**Display Existing Rules** (accessed via From Term) Displays all the terms that have been created as effective terms. The next effective term in the list (which is displayed in term	Beginning major rules effective term. Initially the effective term that has been set for the curriculum rule in the Curriculum Rules Form Window is displayed. No From Term prior to the curriculum rule effective term on the main SOACURR window can be indicated.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			Warning: Do not select List of terms from the option list as the display from this list is misleading. **Updating only:** Copy Current Rule: Allows a new effective term to be created for majors/department rules. End Current Rule May be used when a rule is no longer valid for any module. Only terms after the displayed From Term are in the pick list.	numerical order) will be system generated in the To Term. When there is no next effective term in the list, 999999 (End of Time) is generated. **Copy Current Rule** (accessed via From Term) All existing terms after the term displayed in From Term, with the exception of any terms which are already on the Display Existing Rules list, can be chosen from a list. When a term is chosen from a pick list; the term will be displayed in the From Term field and will be entered in the Display Existing Rules list of terms. The rules for that new effective term can then be edited. **End Current Rule** (accessed via From Term) when a term is picked from the list that is displayed, that term appears in the From Term and the next term	When more than one effective term exists, the message Multiple Effective Terms is displayed. Copy Current Rule Note that once a new effective term is created it cannot be deleted by the client form. End Current Rule From Term in this case means that from this term on, none of the majors are valid. However, after using End Current Rule, it is then possible to check a module or modules as valid for a major.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
				in the listing appears in To Term Checks in checkboxes for all modules for all majors are eliminated when an end term is chosen.		
	2.	To Term	Display only.		End term of major rules. Value of 999999 (end of time) is system generated until a new effective term is created; then the effective term for the new rule becomes the To Term for the old rule. Rules are effective from and including the "From Term" until but excluding the displayed "To Term".	
✓	3.	Major	*For authorized updating only:* *Adding a new major:* It is important to copy the existing rules to the new effective term, prior to adding a new major with a new effective term. <u>Copy Current Rule</u> to copy the rules to whatever effective term applies to the major that you are attaching. Then attach the new major. If you copy the rules at one point in time and add the major later, use <u>Display Existing Rules</u>	When a major is attached to a base rule, it is added effective the term that is displayed in the From Term field and is valid until but not including the term displayed in the To Term field at the time. Only majors that are valid in the time period in the From and to Terms will be displayed (From Term should be chosen from Display Existing Rules List).	Displays valid Majors attached to the program. It is not possible to display the rules that are in effect over time for an individual major code; rules are displayed specific to the date range.	Major must exist as valid major on Major Validation Table STVMAJR.

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			to choose the correct effective term and then attach the new major. Adding/attaching a major must be saved.			
✓	4.	Department			Each major will have an attached department. Where the major is not associated with a specific department, the faculty is entered.	Validation Table Referenced: Department Validation (STVDEPT) which is based on the University Planning Office Administrative Unit Table
	5.	Conc			If one major/dependent concentration has been established for the major, it will be displayed in this field. If more than one concentration has been attached to the major, **** will be displayed in this field.	
	6.	Rec, Adm, Stu, His and CAPP	Changes in this area must be saved.		On/Off indicator for Major rule in Recruiting: Can indicate whether an individual major is valid depending on the	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					module. A check in the checkbox means the major is valid for that module. When majors are discontinued, they may no longer be valid in Recruiting and Admissions but may continue to be valid in General Student etc. Can pick a From Term and indicate that the major is not valid from that term on for a specific module. The module rules which are displayed for a major can differ depending on the From/To Term selected.	
	7.	EDI Mapped			There are no plans to use at this time.	
	8.	Concentrations	Click to view Major Dependent Concentrations Window for the selected major.			

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Rule-Based Concentrations Window

Major Dependent Concentrations Window

The base rule, term ranges for the base rule, the term ranges for the major/department rule, and the major and department (if applicable) codes are displayed in the key block.

This applies to a concentration attached to a major. The presence of a concentration permits its addition to a student's record, however, it does not require the concentration be attached to the student's record.

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	From Term	Double click to access Option List: Select <u>Display Existing Rules</u> : Effective term can be picked from this list and will be displayed in the From Term field.	**Display Existing Rules** (accessed via From Term) Displays all the terms that have been created as effective terms. The next effective term in the list (which is displayed in term	Beginning concentration rules effective term. Initially the effective term that has been set for the curriculum rule in the Curriculum Rules Form Window is displayed. No From Term prior to the curriculum rule effective term on the main SOACURR window can be indicated	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			Warning: Do not select List of terms from the option list as the display from this list is misleading. **Updating only:** Copy Current Rule: Allows a new effective term to be created for concentrations rule. End Current Rule May be used when a rule is no longer valid for any module. Only terms after the displayed From Term are in the pick list	numerical order) will be system generated in the To Term. When there is no next effective term in the list, 999999 (End of Time) is generated. **Copy Current Rule** (accessed via From Term) All existing terms after the term displayed in From Term, with the exception of any terms which are already on the Display Existing Rules list, can be chosen from a list. When a term is chosen from a pick list; the term will be displayed in the From Term field and will be entered in the Display Existing Rules list of terms. The rules for that new effective term can then be edited. **End Current Rule** (accessed via From Term) When a term is picked from the list that is displayed, that term appears in the From Term and the next term	When more than one effective term exists, the message Multiple Effective Terms is displayed. Copy Current Rule Note that once a new effective term is created it cannot be deleted by the client form. End Current Rule From Term in this case means that from this term on, none of the concentrations are valid. However, after using End Current Rule, it is then possible to check a module or modules as valid for a concentration.	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
				in the listing appears in To Term. Checks in checkboxes for all modules for all concentrations are eliminated when an end term is chosen.		
	2.	To Term	Display only.		End term of concentration rules. Value of 999999 (end of time) is system generated until a new effective term is created; then the effective term for the new rule becomes the To Term for the old rule. Rules are effective from and including the "From Term" until but excluding the displayed "To Term".	
	3.	Concentrations	**For authorized updates only**: Adding/attaching a concentration must be saved.		Displays valid Concentrations are attached to a Major. Concentrations are effective the term that is displayed in the From Term field and are valid until but not including the term displayed in the To Term field at the time it is created. **No Effective Terms Found** – this message is displayed if no concentrations have been attached. Multiple Effective Terms - this message is displayed if concentrations have been attached and there is more than one effective term No Message – concentrations are attached and there is only one	Concentration must exist as valid concentration on Major Validation Form STVMAJR.

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					effective term.	
	4.	Rec, Adm, Stu, His and CAPP			On/Off indicator for Concentration rule in Recruiting: Can indicate whether an individual Concentration is valid depending on the module. A check in the checkbox means the Concentration is valid for that module. When Concentration are discontinued, they may no longer be valid in Recruiting and Admissions but may continue to be valid in General Student etc. Can pick a From Term and indicate that the Concentration is not valid from that term on for a specific module. The module rules, which are displayed for a Concentration, can differ depending on the From/To Term selected.	
	5.	Activity Date			Last date record was modified.	

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Curriculum Minor Rules Window

This window is accessed from the Curriculum Rules Form Window. The base rule information is displayed in the key block.

This window functions in the same way that the Major/Department Rules and Major Dependent Concentrations windows functioned.

Note: Numbers have been added to the adjacent form to help find and identify the different fields. These numbers correspond to the table below, which defines or explains each field's purpose.

Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
	1.	From Term	Double click to access Option List: Select Display Existing Rules Effective term can be picked from the list and will be entered in the From Term field Warning: Do not select	**Display Existing Rules** (accessed via From Term) Displays all the terms that has been created as effective terms. The next effective term in the list (which is displayed in term numerical order) will be	Beginning minor rules effective term. Initially the effective term that has been set for the curriculum rule in the Curriculum Rules Form Window is displayed. No From Term prior to the curriculum rule effective term on the main SOACURR window can be indicated. When more than one effective	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
			List of terms from the option list as the display from this list is misleading Copy Current Rule: Allows a new effective term to be created for minors rule. End Current Rule May be used when a rule is no longer valid for any module. Only terms after the displayed From Term are in the pick list	system generated in the To Term. When there is no next effective term in the list, 999999 (End of Time) is generated. **Copy Current Rule** (accessed via From Term) All existing terms after the term displayed in From Term, with the exception of any terms which are already on the Display Existing Rules list, can be chosen from a list. When a term is chosen from a pick list; the term will be displayed in the From Term field and will be entered in the Display Existing Rules list of terms. The rules for that new effective term can then be edited. **End Current Rule** (accessed via From Term) When a term is picked from the list that is displayed, that term appears in the From Term and the next term in the listing appears in To Term.	term exists, the message Multiple Effective Terms is displayed. Copy Current Rule Note that once a new effective term is created it cannot be deleted by the client form. End Current Rule From Term in this case means that from this term on, none of the concentrations are valid. However, after using End Current Rule, it is then possible to check a module or modules as valid for a concentration	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
				Checks in checkboxes for all modules for all concentrations are eliminated when an end term is chosen.		
	2.	To Term	Display only.		End term of minor rule. Value of 999999 (end of time) is system generated until a new effective term is created; then the effective term for the new rule becomes the To Term for the old rule. Rules are effective from and including the "From Term" until but excluding the displayed "To Term.	
	3.	Minors			Displays valid Minors attached to the Program.	Minor must exist as valid minor on STVMAJR.
	4.	Rec, Adm, Stu, His and CAPP			On/Off indicator for Minor rule in Recruiting: Can indicate whether an individual Minor is valid depending on the module. A check in the checkbox means the Minor is valid for that module. When Minor are discontinued, they may no longer be valid in Recruiting and Admissions but may continue to be valid in General Student etc. Can pick a From Term and indicate that the Minor is not valid from that term on for a specific module. The module rules, which are displayed for a Minor, can differ depending on the From/To Term	

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Req'd	#	Field	Action	Reaction	Explanation/Description	Related Documentation
					selected.	
	5.	Activity Date			Date record was last modified.	

Notes:

a) Even if the controls are set to fatal on SOACURR, if no Major, Minor, or Concentration is attached to a base rule, any major, minor or concentration can be attached to a student record.

b) Even if the controls are set to fatal on SOACURR, if a minor is attached to a base curriculum rule, a student can be put in the program/curriculum and it is not necessary to attach a minor to the record. Therefore it is not possible to 'force' a minor on a student record. .
This applies to a concentration attached to a major. The major can be saved without the concentration.

c) If majors or minors have been attached to a base curriculum rule or if concentrations have been attached to a major, then no other majors, minors, or concentrations can be attached to a student's record.

Validation Tables Accessed by SOACURR
STVLEVL
STVCAMP
STVCOLL
STVDEGC
STVTERM
STVMAJR
STVDEPT

Other Forms Accessed by SOACURR

SMAPRLE (Program Definition Rules Form)
SOAXCUR (EDI cross-reference Curriculum)

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Appendix A – Academic Programs Types

Programs are structured around degrees. Because students apply for admission to a degree program and are audited for graduation from that program a minimum of one program exists for each degree code. In many cases there is the need to create more than one program per degree code in order to handle admissions separately for different majors within the degree or due to differing degree audit requirements (e.g. different GPA or credit requirements). Whenever admissions is handled separately or overall degree requirements are quite different, you will usually find separate programs. Sample flavours of program structures follow:

1. **a one-to-one relationship between a program and a degree**. This usually occurs with Certificates and Diplomas. Normally there is only one major valid for the degree.

    e.g. Certificate in Proficiency in English
    e.g. Diploma in Public Accountancy

2. **a one-to-one relationship between a program and each major code within a degree**. There is more than one major valid for the degree and each combination of degree and major is a separate program.

    In the example below B Eng Electrical and B Eng Electrical Honours each have a unique major code and thus separate program codes to indicate separate degree audit requirements.

    e.g. Individual programs for B Eng Civil, B Eng Elec, B Eng Elec Honours etc.

3. **a one-to-many relationship between a program and choice of many majors within a degree where there are similar general requirements such as GPA and total credits**.

    e.g. one program B Arts with a choice of many major codes
    e.g. a separate program for B Arts Honours with a choice of many honours codes

    Note that in the example above, although there are many majors attached to each program, a BA degree does require two programs BA and BA Honours to handle very different degree audit requirements. (i.e BA Honours program requires a higher GPA)

4. **Each faculty has one Non-Degree program with majors of Special, Visiting, Quebec Exchange (IUT students), and Non-Quebec Exchange**. The latter two categories are separated from the major of Visiting to permit separate tracking of students and processing of fee exemptions.

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Appendix B – Standards for searching for categories of programs

These standards facilitate searching for categories of programs.
For example, one can search for all honours programs or all diploma programs.

- Program codes begin with the degree code wherever possible.

- Within the program code there should be no dashes within the degree part of the code but, if possible, there should be one following the degree code and other characters (e.g. BED-PHYS-ED) or between multiple degree codes (e.g BCL-LLB-MBA)

- Codes for Honours programs end in "-H" and the descriptions end in "Honours"
    e.g. BA-H   B Arts Honours

- Special and Visiting students can be found under Non-Degree Programs by faculty.
    e.g. code of "NO-DEG-ARTS"

- Certificate and diploma codes in the Centre for Continuing Education begin with "C-" 'D-", "GC-", or "GD-" dependent upon whether the degree description is Certificate, Diploma, Graduate Certificate, or Graduate Diploma.

- All certificate and diploma codes in the "College" of Graduate Studies begin with a "C-"or "D-" . Their descriptions begin "Gr Cert" or "Gr Dip".

- All masters or doctorate program codes and descriptions must end in "–T" for Thesis or "-N" for Non-thesis

- All qualifying programs in Graduate Studies are programs whose code starts with "QUAL." There is no more than one qualifying program per degree with multiple attached majors. A concentration of "Qualifying" must be attached to each major.

- All ad personam programs in Graduate Studies are programs whose codes start with the degree name followed by "AD-PER. A concentration of "Ad personam" is attached to each major.

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Appendix C – Legend for Major and Minor codes and their descriptions

The major field is a generic field for subjects attached to programs. The subjects may be majors, honours, etc as listed below. The coding and description standards facilitate the identification of specific categories of major codes.

Please note that a search can be done for _one category of majors within a program_. For example, to search for all joint honours component subjects within a program, use %2 in the major code field or –HC in the description field.

4TH CHARACTER OF CODE	DESCRIPTION ENDS WITH	TRANSLATION
Blank		Major
1	-Hon	Honours
2	-HC	Jt Honours Component
3	-FP	Faculty Program
4	-T	Thesis
5	-N	Non-Thesis
8	-Con	Major or Minor Concentration

Eg. Major codes for Anthropology attached to BA programs:

CODE	DESCRIPTION	FULL DESCRIPTION
ANT1	Anthropology –Hon	Honours Anthropology
ANT2	Anthropology –HC	Jt Honours Component Anthropology
ANT8	Anthropology –Con	Major Concentration Anthropology*

* ANT8 translates as Minor Concentration Anthropology when it appears in the minor field on a student's record.

Eg. Major codes for Anthropology attached to MA or Ph D programs:

CODE	DESCRIPTION	FULL DESCRIPTION
ANT4	Anthropology –T	Anthropology Thesis
ANT5	Anthropology –N	Anthropology Non-Thesis

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