Albert: Study Agreements
Business Process Guide

Created and Maintained by Holly Halmo
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Introduction

As the University expands globally, it is critical that we know where our students are in the world during a given term of study. **Students studying away from their home campus** (a NYU portal – NYC, Abu Dhabi, Shanghai) at another portal, at a global site (sites where there are NYU-run programs at NYU facilities. Current **global sites**: Accra, Berlin, Buenos Aires, Florence, London, Madrid,Pairs, Prague, Sydney, Tel Aviv, and Washington, DC) or in any other **exchange/study away program** can be tracked within Albert via a Study Agreement.

For all students studying away from their home campus, the **Study Agreement** needs to be updated for each term, and session within the term (if applicable). In the same way that location codes denote where a class is taking place during a specific term, study agreements allow us to track where students are studying in a given term and, in some cases are used to properly bill students and in all cases for Intuitional Research reporting purposes.

Schools contact the Registrar’s Office and let them know of any new study-away programs that were recently created. The Registrar’s Office then determines if a study agreement is needed, and, if so, creates the agreement and assigns access. Each administrator who has access to place study agreements has the study agreements for their home school/department available to them. Should an administrator not have access to a Study Agreement that they need, or need to create a new one, please contact Al Gentile or Holly Halmo in the Registrar’s Office.

This guide provides the manual steps and batch process steps to place student agreements on students.

*Study agreements do not replace NYU Traveler nor do they sync with NYU Traveler.*

Administrators will have access to update the Study Agreements for all students attending their department/school’s study away programs once students have been term activated for the term.

Study agreements must be placed on the students' records **before** the census date of the term.

**Census dates:**
- For Fall and Spring: end of the 3\textsuperscript{rd} week of the term
- For J-term: 4\textsuperscript{th} day of classes
- For Summer: end of the 10\textsuperscript{th} week of the term
When to use Study Agreements:

- When a student is studying away from their home school for a full term.
  - If students will be away for more than one term, they will need a study agreement placed on each term’s term activation page.
  - For a student participating in two or more short-term courses during the summer, for example, they should then receive two study agreements within the summer term. Note that one will have to be coded as “primary”.
    - The “primary” study agreement is the one that displays first on the transcript for the term students are away.

When not to use Study Agreements:

- When a student is going abroad during J-Term, but will be registered for the class in the spring term.
- When a student goes on a trip abroad during Spring Break, or any other time, as part of a course.
- NOTE: For both of these examples, as well as any other time students are traveling for any reason, the students should utilize NYU Traveler to document their trips.

Study Agreements: Conventions and Which Agreements to Use When

(For AD and SH agreements, see next section)

We have tried to follow (as much as possible!) a naming convention for study agreements where either the first character (digit) or first two characters (letters) denote the school that owns the program:

- 1 – Faculty of Arts and Science
- 2 – Tisch
- 3 – Steinhardt
- 4 – Gallatin
- 5 – Wagner
- 6 – SCPS
- 7 – Stern (including IBEX)
- 8 – Nursing
- 9 – Social Work
- AD – Abu Dhabi
- GLOBAL – Global Programs offerings
- GNU – for students going from portal to portal during fall and spring
- SH - Shanghai
- UY – Polytechnic School of Engineering
- There are also agreements that do not follow one of the conventions above as they are older agreements that were in place before these conventions were created.
- For students who study away at a non-NYU program, the Study Agreement would be the agreement that is the “location” of the student’s program. For example, if a student attends a non-NYU exchange in Japan, the study agreement would be JP - Japan.

NOTE: If a new study agreement is needed, email Holly (hollyh@nyu.edu) with the request.
**Study Agreements for AD and SH: What/When/Why/How**

As the University goes more global, the Registrar’s Office is working to update business practices to accommodate the reporting needs of all global sites and portals. New Study Agreements have been created for Abu Dhabi and Shanghai in order to properly code and track students as they move throughout the University.

Each code will be placed on the student by the school that owns the program. Therefore, any codes that begin with AD will be placed on the student by the AD Registrar’s office and those that begin with SH will be placed by the Shanghai Registrar’s office. Those that begin with GLOBAL or GNU will be placed by the Global Programs Office in NY.

Note that these new AD/SH codes are utilized slightly differently than the codes for programs offered by schools at the Square.

**There are several types of codes for AD and SH, which break down as follows:**

1. **For students who take AD or SH classes offered at global sites during J-Term and/or summer** - these students can be AD or SH students OR students from any other school enrolled in those classes:
   - AD-0B: AD in Buenos Aires
   - AD-0C: AD in Paris
   - AD-0D: AD in Berlin
   - AD-0F: AD in Florence
   - AD-0G: AD in Ghana
   - AD-0L: AD in London
   - AD-0M: AD in Madrid
   - AD-0P: AD in Prague
   - AD-0T: AD in Tel Aviv
   - AD-DC: AD in Washington, DC
   - AD-SY: AD in Sydney
   - SH-0B: SH in Buenos Aires
   - SH-0C: SH in Paris
   - SH-0D: SH in Berlin
   - SH-0F: SH in Florence
   - SH-0G: SH in Ghana
   - SH-0L: SH in London
   - SH-0M: SH in Madrid
   - SH-0P: SH in Prague
   - SH-0T: SH in Tel Aviv
   - SH-DC: SH in Washington, DC
   - SH-SY: SH in Sydney

2. **For any Washington Square student who is taking AD courses in SH in J-Term or summer/SH courses in AD in J-Term or summer.**
   - AD-0S: AD in Shanghai
   - SH-0U: SH in Abu Dhabi

3. **For any AD student who is taking AD courses in SH in J-Term or summer/SH student taking SH courses in AD in J-Term or summer.**
   - AD-1S: AD in Shanghai
   - SH-1U: SH in Abu Dhabi
4. For AD or SH students who are taking AD or SH courses at Washington Square during J-Term or summer. NYUAD or NYUSH will place these codes on their students who study away at Washington Square in the intersessions. **NOTE:** Students whose home campus is WSQ should not have these codes placed on their records as they are not studying away from their home campus, even if they are enrolled in a course offered by AD or SH.
   - **AD-WS:** AD in Washington Square
     - An AD or SH student taking AD classes offered at WSQ for J-Term or summer
   - **SH-WS:** SH in Washington Square
     - An AD or SH student taking SH classes offered at WSQ for J-Term or summer

5. For **Shanghai students taking Abu Dhabi-sponsored classes in AD** during the J-term or summer/for **Abu Dhabi students taking Shanghai-sponsored classes in Shanghai** over the J-term or summer.
   - **SH-AD:** SH in AD (SH student at AD taking AD classes)
   - **AD-SH:** AD in SH (AD student at SH taking SH classes)

6. For **non-AD students (WSQ students) studying at AD and taking AD courses in the J-term or summer or non-SH students studying at SH and taking SH courses in the J-Term or summer.** Also used for graduate students who study away from WSQ to AD/SH.
   - **AD-AD:** NYU Abu Dhabi
     - **NOTE:** If the student was in AD taking SH courses, the SH-0U code would be used.
   - **SH-SH:** NYU Shanghai
     - **NOTE:** If the student was in SH taking AD courses, the AD-0S code would be used.
   - **NOTE:** During the fall or spring, a GNU-AD or GNU-SH code would be used for all undergraduate students. Global Programs Office will put these codes on the students as they go through their office.

7. For **AD or SH students at Washington Square – any term.**
   - **GNU-WS** will be used for any AD or SH student who goes to WS.
   - For the **fall or spring**, they will be coded by Global Programs Office in NY.
   - For the **J-term or summer**, they will be coded by AD.

Additionally, **AD has internship- and research-specific codes for their students going abroad for internships/research.** The codes are country-based, and more can be added as students select more/other countries.
   - Research: **ADXX – R** = Research in XX (AD)
   - Internship: **ADXX** = Internship in XX (AD)
A note on AD location codes for Directed Study courses during J-term: A location code, “AD-Other,” has been created for AD’s use. The primary purpose of this is for reporting and to be able to identify directed study courses which are fulfilling AD’s J-Term requirements, irrespective of which term they are offered. AD students who are in classes with this code will NOT have study agreements on them, since they are at their home location.

### AD/SH Study Agreement Cheat Sheet

<table>
<thead>
<tr>
<th>Home School of Student</th>
<th>Where are they?</th>
<th>What courses are they taking?</th>
<th>What term is it?</th>
<th>USE THIS AGREEMENT</th>
<th>Who puts it on?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abu Dhabi</td>
<td>WS</td>
<td>WS</td>
<td>Fall/Spring</td>
<td>GNU-WS</td>
<td>Global</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>WS</td>
<td>WS</td>
<td>J-term/Summer</td>
<td>GNU-WS</td>
<td>AD</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>WS</td>
<td>Abu Dhabi</td>
<td>J-term/Summer</td>
<td>AD-WS</td>
<td>AD</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>Shanghai</td>
<td>Abu Dhabi</td>
<td>J-term/Summer</td>
<td>AD-1S</td>
<td>AD</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>Shanghai</td>
<td>Shanghai</td>
<td>Fall/Spring</td>
<td>GNU-SH</td>
<td>Global</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>Shanghai</td>
<td>Shanghai</td>
<td>J-term/Summer</td>
<td>AD-SH</td>
<td>SH</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>Anywhere</td>
<td>Internship</td>
<td>Any</td>
<td>ADXX</td>
<td>AD</td>
</tr>
<tr>
<td>Abu Dhabi</td>
<td>Anywhere</td>
<td>Research</td>
<td>Any</td>
<td>ADXX - R</td>
<td>AD</td>
</tr>
<tr>
<td>WSQ</td>
<td>Shanghai</td>
<td>Abu Dhabi</td>
<td>J-term/Summer</td>
<td>AD-OS</td>
<td>AD</td>
</tr>
<tr>
<td>WSQ</td>
<td>Abu Dhabi</td>
<td>SH</td>
<td>J-term/Summer</td>
<td>SH-0U</td>
<td>SH</td>
</tr>
<tr>
<td>WSQ</td>
<td>Abu Dhabi</td>
<td>Abu Dhabi</td>
<td>J-term/Summer</td>
<td>AD-AD</td>
<td>AD</td>
</tr>
<tr>
<td>WSQ</td>
<td>Shanghai</td>
<td>Shanghai</td>
<td>J-term/Summer</td>
<td>SH-SH</td>
<td>SH</td>
</tr>
<tr>
<td>WSQ</td>
<td>Abu Dhabi</td>
<td>WS</td>
<td>Fall/Spring</td>
<td>GNU-AD</td>
<td>Global</td>
</tr>
<tr>
<td>WSQ</td>
<td>Shanghai</td>
<td>WS</td>
<td>Fall/Spring</td>
<td>GNU-SH</td>
<td>Global</td>
</tr>
<tr>
<td>WSQ</td>
<td>All sites</td>
<td>AD</td>
<td>J-term/Summer</td>
<td>AD-0X</td>
<td>AD</td>
</tr>
<tr>
<td>WSQ</td>
<td>All sites</td>
<td>SH</td>
<td>J-term/Summer</td>
<td>SH-0X (X is letter of site)</td>
<td>SH</td>
</tr>
<tr>
<td>Shanghai</td>
<td>WS</td>
<td>WS</td>
<td>Fall/Spring</td>
<td>GNU-WS</td>
<td>Global</td>
</tr>
<tr>
<td>Shanghai</td>
<td>WS</td>
<td>WS</td>
<td>J-term/Summer</td>
<td>GNU-WS</td>
<td>SH</td>
</tr>
<tr>
<td>Shanghai</td>
<td>WS</td>
<td>Shanghai</td>
<td>J-term/Summer</td>
<td>SH-WS</td>
<td>SH</td>
</tr>
<tr>
<td>Shanghai</td>
<td>Abu Dhabi</td>
<td>Shanghai</td>
<td>J-term/Summer</td>
<td>SH-1U</td>
<td>SH</td>
</tr>
<tr>
<td>Shanghai</td>
<td>Abu Dhabi</td>
<td>Abu Dhabi</td>
<td>Fall/Spring</td>
<td>GNU-AD</td>
<td>Global</td>
</tr>
<tr>
<td>Shanghai</td>
<td>Abu Dhabi</td>
<td>J-term/Summer</td>
<td>SH-AD</td>
<td>AD</td>
<td></td>
</tr>
</tbody>
</table>
Process: Placing a Study Agreement on a Student (Manual process)

Navigation: Records and Enrollment > Student Term Information > Term Activate a Student

1. Search for student.

   **Term Activate a Student**

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

<table>
<thead>
<tr>
<th>Search Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID:</td>
</tr>
<tr>
<td>Campus ID:</td>
</tr>
<tr>
<td>National ID:</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>First Name:</td>
</tr>
</tbody>
</table>

   - Case Sensitive

   ![Search and Clear buttons](Image)

   - Basic Search
   - Save Search Criteria

2. Click on the **NYU External Study** Tab. You may need to use the small arrow on the right to navigate to the tab.
   - You must populate the “NYU External Study” tab and not the “External Study” tab for reporting purposes!
3. Locate the appropriate academic career (if there is more than one) by using the arrow keys to move forward or backward.

4. Locate the appropriate Term by using the arrow keys to move forward or backward.
5. Populate fields listed below:

- **Session**: select appropriate value using Look Up (Defaults to ‘1’)
- **Study Agreement**: select appropriate value using Look Up
  - If you do not see the study agreement you need, please contact Holly Halmo in the Office of the Registrar.
- **Primary Study Agreement**: select checkbox if this is the primary study agreement. Note that if you do not select the primary study agreement checkbox and you are only entering one study agreement, then the default is to make that study agreement the primary. The checkbox will automatically default to that setting when the page is saved. When more than one study agreement is being entered, a primary study agreement must be selected. The primary study agreement will be the one that displays first on the transcript under the term the student is away.
- **Start Date**: Enter the start date of the program the student is attending (optional).
- **End Date**: Enter the end date of the program the student is attending (optional).
- **Room Type**: Enter if known/needed (optional).
- **Board Plan**: Enter if known/needed (optional).
- **Fields to leave blank**:
  - Special Board Code
  - External Org ID
- Select to add additional Study Agreements for this term for this student.

6. Save changes.

**NOTE**: Once the “NYU External Study” tab is populated, the study agreement will automatically populate on the “External Study” tab. However, populating the “External Study” tab with a study agreement will NOT automatically populate the Study Agreement field on the “NYU External Study” tab. It is crucial that the “NYU External Study” tab is populated with the correct study agreement as it is this tab that is used for reporting and billing. You do not need to fill in the “External Study” tab as it will auto-populate.
**Study Agreement: Batch Upload**

Functionality exists to upload study agreements for multiple students at a time in a “batch.” You can upload students who are all studying away at the same time in the same location, or for students across multiple terms they are term activated for and who are going to different sites.

Note: Contact Holly (hollyh@nyu.edu) if a member of your team needs access to this feature in Albert. Note that this functionality is assigned to all users who have the Study Agreement role already, so if you or your team member can assign study agreements, they can use the batch!

1. Prepare a .csv file as follows:

   **File requirements**: .csv (comma delimited) file, no headers

   The columns must include the information as follows:
   - A: EmplID (mandatory)
   - B: Term Code (mandatory)
   - C: Session Code (mandatory)
   - D: Study Agreement Code (mandatory)
   - E: Primary Study Agreement? (insert Y or N)
   - F: External Org ID (optional)
   - G: Start date (optional)
   - H: End date (optional)
   - I: Special board code (optional)
   - J: Room type code (optional)
   - K: Board plan (optional)

   **Example:**

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
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<tbody>
<tr>
<td>10422984</td>
<td>1148</td>
<td>1</td>
<td>GNU-WS</td>
<td>Y</td>
<td>10/1/2014</td>
<td>12/1/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10224592</td>
<td>1148</td>
<td>1</td>
<td>GLOBAL-OB</td>
<td>Y</td>
<td>9/5/2014</td>
<td>12/15/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10726257</td>
<td>1146</td>
<td>S</td>
<td>AD-AD</td>
<td>Y</td>
<td>6/1/2014</td>
<td>8/15/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Navigate to: NYU Modifications>NYU Student Records>Load Study Agreement Batch

3. If this is your first batch, click “Add a New Value,” create a Run Control ID and click “Add”; if you have created one in the past, enter it on the “Find an Existing Value” tab and click “Search.”

4. On the “Load Study Agreement” page, click “Upload File.”
   a. Click “Browse”
   b. Find your .csv file and click “Open”
   c. Click “Upload”

5. Enter a file source (if applicable) – this is the list of people that an email success/error message will be sent to when the batch runs.

6. Click “Run.”

7. Select a “NT” server (PSNT, PSNT1, PSNT2, PSNT3, PSNT4) and click “OK.”

8. You should see a process number under the “Run” button.
9. Click “Process Monitor” and refresh until a “details” hyperlink appears.
10. Click “Details” hyperlink.
11. Click “View Log/Trace”
12. Open the files that have ERROR and SUCCESS in the file name to see the logs for each.
13. Fix any errors in your .csv file and run process again until no errors are reported.