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PeopleSoft Campus Community 9.0 Fundamentals PeopleBook

March 2012

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PeopleSoft Campus Community 9.0 Fundamentals PeopleBook
SKU hrcs90lscc-b0312

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PeopleSoft Campus Community Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Campus Solutions Application Fundamentals.
- PeopleBook structure.
- About These PeopleBooks.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or application.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Campus Community.

PeopleSoft Campus Solutions Application Fundamentals

Essential information describing the setup and design of your system appears in two companion volumes of documentation, this PeopleBook, which is *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook* and *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

Whether you are implementing one Campus Solutions application, a combination of Campus Solutions applications, or the entire Campus Solutions product line, you must become familiar with information provided in these two fundamental books for successful implementation.

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook.

Chapters	***Description***
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	***Description***
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with Campus Community

This chapter provides an overview Campus Community and discusses:

- Campus Community business processes.
- Campus Community integrations.
- Campus Community implementation.

Campus Community Overview

Individuals and organizations are the foundation of PeopleSoft Campus Solutions. You use Campus Community to create the records for the individuals and organizations that comprise your institution's community. After you create the records, use Campus Community to continue to update, maintain, and track information about the individuals and organizations associated with your institution.

Campus Community Business Processes

You must design and implement Campus Community before you can fully implement PeopleSoft Campus Solutions. In the planning phase of your implementation, you must carefully consider how to design names, addresses, and other basic elements in Campus Community for consistent use by all Campus Solutions applications and throughout all business processes across your institution. These design decisions provide the framework for creating all people and organization records in your database.

Note. For full implementation planning, you will also want to read all of the setup chapters in this PeopleBook, the PeopleSoft Campus Solutions Fundamentals 9.0 PeopleBook, and take advantage of all PeopleSoft sources of information, including installation guides, table-loading sequences, data models, and business process maps.

By implementing Campus Community, you set up tables and options to support the management of unique IDs and to support the following business processes, which are discussed in this PeopleBook:

- Adding People to PeopleSoft Campus Solutions and Managing Biographical Information:

  You must use the Biographical Details page of the Add/Update a Person component to enter biographical data and create records for people in your database from any of the Campus Solutions applications.

  Biographical information enables you to enter the data that uniquely describes each individual, including their names, addresses, phone numbers, and personal attributes such as ethnicity, language, and religious preferences data.

  Biographical data also includes FERPA privacy control, relationships, emergency contacts, and work experience data for individuals. (FERPA functionality enables you to provide and track the student's ability to control the release of their personal data, as required by the U.S. Family Educational Rights and Privacy Act regulation, but can also be used globally to manage privacy controls at any institution.)

  In addition to biographical data, you can track an individual's health, identification, and participation information.

  - Managing Health Data:

    Health information enables you to track immunizations and eye, audiometric, and physical exams.

  - Managing Personal Identification Data:

    Personal identification data enables you to post photos of individuals and enter other data about items that officially and uniquely identify individuals in the community at large, including citizenship, driver's licenses, and residency status.

  - Managing Participation Data:

    Participation data enables you to enter and track an individual's athletic participation, extracurricular activities, honors and awards, and licenses, certificates, and memberships.

- Managing System IDs:

  You can control the autonumbering of system IDs and define priority data to control the deletion of IDs in your database.

- (NZL) Managing National Student Index (NSI) Data:

  You can load NSI data and process responses to new NSI requests and update current records and change requests.

- Searching for Records and Using Search/Match:

  You can enter data on search dialog pages to search for records in your database. You can define various levels of search, using use Search/Match, to detect potential duplicate records before adding a new record. You can force Search/Match at save time or allow users to run ad hoc searches.

- (USA) Managing Patriot Act SEVIS Solution (PeopleSoft PASS) Visa Processing:

  You can prepare and process required information about international students and exchange visitors and their dependents and pass it to the internet-based Student and Exchange Visitor Information System (SEVIS) maintained by U.S. Department of Homeland Security (DHS). PeopleSoft PASS enables you to collect the data, monitor changes, and report student and exchange visitor changes.

- Managing the 3Cs — Communications, Checklists, and Comments:

  Campus Community's 3Cs enable you to create and track communications to individuals or organizations, to create and monitor checklists of items required of an individual, and to enter comments. You can use the 3C engine to automate the assignment and tracking of communications and checklists.

- Managing Service Indicators:

  Service indicator functionality enables you to assign a positive or negative indicator to an individual's record to identify services that are available to or should be denied for that individual.

- Managing Organization Data:

  Organization functionality enables you to create records for organizations, including identifying an organization's location, departments, and contacts data.

- Managing Committee Data:

  Committee data enables you to assign members to committees and assign tasks to them.

- Managing Campus Event Planning:

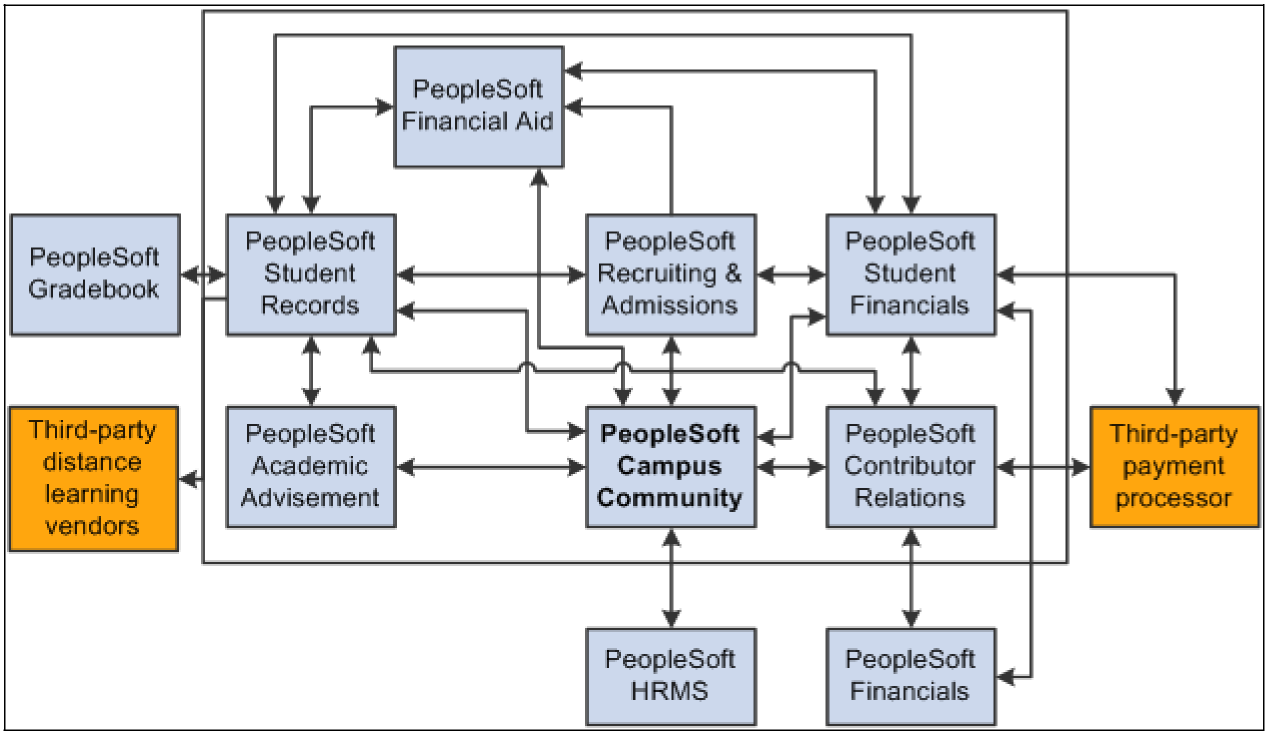
  Events data enables you schedule one or several meetings within an event, reserve facilities and resources for each, and invite attendees. You can also track attendance.

Campus Community Integrations

Campus Community integrates with many PeopleSoft applications including:

- PeopleSoft Financial Aid.
- PeopleSoft Recruiting and Admissions.
- PeopleSoft Gradebook.
- PeopleSoft Student Records and any associated third-party distance learning vendors.
- PeopleSoft Student Financials and any associated third-party payment processor.
- PeopleSoft Academic Advisement.
- PeopleSoft Contributor Relations.
- PeopleSoft Human Resources Management Services.
- PeopleSoft Financials.

The following diagram illustrates the integration between Campus Community and these applications.



PeopleSoft Campus Community integrations

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

Campus Community Implementation

PeopleSoft Setup Manager for PeopleSoft HRMS and Campus Solutions 9.0 PeopleBook enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Campus Community also provides component interfaces to help you load data from your existing system into Campus Community tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists Campus Community components that have setup component interfaces:

Component	***Component Interface***	***References***
COMM_CATG_TBL	SCC_COMM_CATG_TBL	
COMM_CTXT_TBL	SCC_COMM_CTXT_TBL	

See Also

PeopleTools: PeopleSoft Setup Manager

Chapter 2

Designing Campus Community

This chapter provides an overview of designing Campus Community and discusses how to:

- Review or define Campus Community installation settings.
- Set up Campus Community and PeopleSoft Human Resources Management (HRMS) shared elements.
- Establish name usages.
- Establish name type defaults.
- Establish salutations.
- Establish address usages.
- Establish phone usages.
- Establish campus locations.
- Establish ID delete control.
- Establish Search/Match criteria.
- Establish Family Educational Rights and Privacy Act (FERPA) privacy control.
- Establish 3C deletion policy control.

Designing Campus Community

Before you can fully implement Campus Community, you must verify settings and establish elements for people and organization processing.

- Verify that your system's default settings reflect your institution's design decisions and reset them if they do not.

  Reviewing these settings can provide insight into some of the values that your system automatically displays or formats. For example, reviewing the ID settings in the Installation Table component (described in the *PeopleSoft Campus Solutions 9.0 Application Fundamentals PeopleBook*) helps you identify where seed numbers are set for the automatic sequencing and assigning of ID numbers. Reviewing the country, state, and province codes (described in this chapter) ensures that the codes that your institution uses are available and that the standard address format that is set to appear for each, will serve your institution's needs.

- Set up name and address formats and identify types to manage individual names and addresses.

- Create usages to identify which types of names or addresses to use in specific circumstances.
- Review the National ID table to determine if the predefined national ID types, which PeopleSoft ships, include the identification numbers for the countries and formats that your institution requires.

  National ID numbers provide a method of identifying and tracking individuals. PeopleSoft ships national ID number formats predefined per country, including United States social security numbers (SSNs) and Canadian social insurance numbers (SINs).
- Establish salutations for use in communications with individuals in your system, set priority criteria to control the addition and deletion of records in your system, and specify the sets of data to use to detect duplicate or multiple records.
- Designate the types of information to control about individuals so that all departments in your institution can use the system to comply with government privacy regulations and any internal privacy policies.
- (NZL) Enable online NSI processing and set default values to use for the National Student Index (NSI) provider code and, current file number.
- Define the communication preferences that your institution wants to support to communicate with the student population.

After you establish these basics, you can create records and begin using the full functionality of PeopleSoft Campus Solutions.

Warning! Before adding records or entering and updating data, you must be familiar with PeopleSoft applications, including the Add, Update/Display, Include History, and Correct History modes and the PeopleSoft method of applying effective dates with active or inactive statuses.

See *PeopleTools: PeopleSoft Applications User's Guide* "Understanding Effective Dates."

Reviewing or Defining Campus Community Installation Settings

To review Campus Community installation settings, use the Campus Community Installation component (INSTALLATION_CC).

This section lists prerequisites and discusses how to: review or define Campus Community default installation settings.

- Review or define default installation settings for events, relationships, SEVIS, checklists, national IDs and communication preferences.
- Review or define default installation settings for name and address types.
- (NZL) Review or define default installation settings for National Student Index processing.

Prerequisites

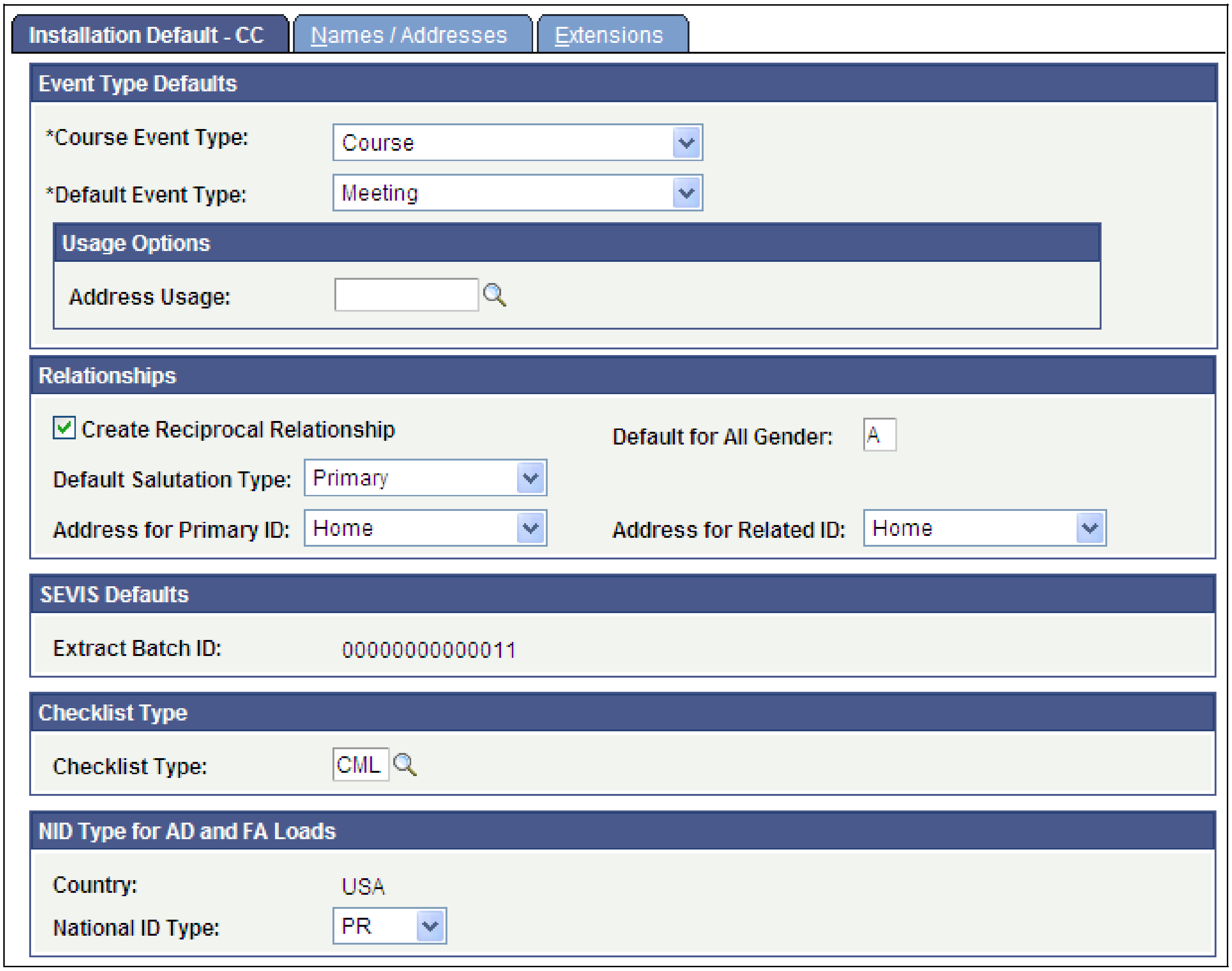
Some tables are delivered with predefined values in them so that default installation values can be established. If you must change default settings (for example for event types, salutations, address types, and so on) and the values that you desire are not available, you can modify or add values to those tables.

Page Used to Review or Define Campus Community Installation Settings

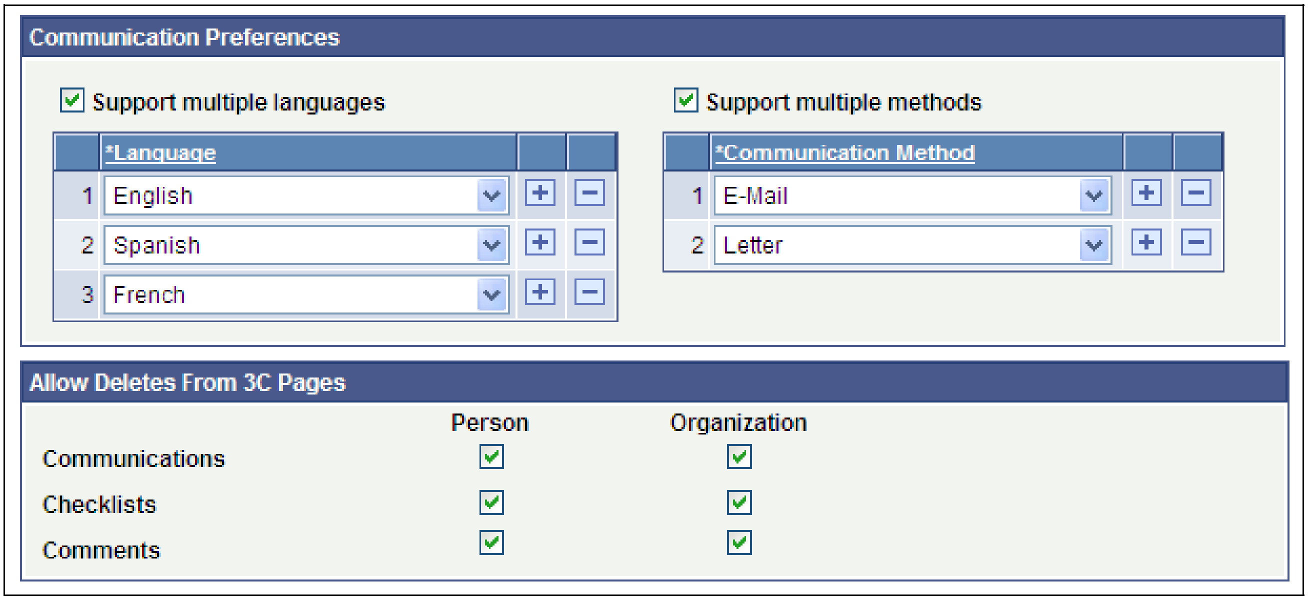
Page Name	***Definition Name***	***Navigation***	***Usage***
Installation Default - CC	INSTALLATION_CC	Set Up SACR, Install, Campus Community Installation, Installation Default - CC	Review or define Campus Community default installation settings for events, relationships, checklists, SEVIS, national IDs and communication preferences.
Names / Addresses	SCC_INSTALL_CC2	Set Up SACR, Install, Campus Community Installation, Names / Addresses	Review or define Campus Community default installation settings for names and addresses.
Extensions	SCC_INSTALL_EXT	Set Up SACR, Install, Campus Community Installation, Extensions	Review or define Campus Community default installation settings for New Zealand's National Student Index (NSI).

Reviewing or Defining Default Installation Settings for Events, Relationships, SEVIS, Checklists, National IDs and Communication Preferences

Access the Installation Default - CC page (Set Up SACR, Install, Campus Community Installation, Installation Default - CC).



Installation Default - CC page (1 of 2)



Installation Default - CC page (2 of 2)

Event Type Defaults

Course Event Type

The default value is *Course*. Do *not* change this value.

PeopleSoft Student Records treats courses as events. Therefore, the Course Event Type field must be set to *Course* so that you can schedule classes.

Default Event Type

The default value is *Meeting*.

You can override this value (using the Events component) if your institution wants to set a different default value for the type of event.

Relationships

Create Reciprocal Relationship

The system selects this check box by default. When it is selected, the system automatically creates the reciprocal relationship between the related ID and the primary ID when you create a relationship on the Relationships page between a primary ID and another ID (the related ID) within the system.

For example, if you create a relationship between Mary Smith (the primary ID, as the mother) and Denise Strauss (the related ID, as the daughter), the system automatically creates the reciprocal relationship for Denise Strauss, identifying her as daughter with a relationship to Mary Smith, as mother.

If you clear this check box, only Mary Smith's record reflects the mother/daughter relationship.

Default for All Gender

The default value is *A*(all). Do *not* change this value.

The system uses the value in this field to create the reciprocal relationship. Changing the value here changes genders throughout your system, which you might not intend to do.

Default Salutation Type

The default value is *Primary*.

The system displays and uses this value, which appears by default from the Joint Salutation Type page, as the salutation for two people with a relationship that are set up to receive joint communications on the Relationships page.

Address for Primary ID

The default value is *Home.*

When you create a relationship between two individuals on the Relationship page, the system uses this value to display an address for the primary ID individual on the Relationship Address page.

For example, with the default value set to *Home*, the system displays the home address for the primary ID as defined on the Addresses page, unless otherwise instructed.

Address for Related ID

The default value is *Home.*

When you create a relationship between two individuals on the Relationships page, the system uses this value to display an address for the related ID individual on the Relationship Address page.

For example, when the value is *Home*, the system displays the home address for the related ID as defined on the Addresses page, unless otherwise instructed.

SEVIS Defaults

Extract Batch ID

The system displays the batch number used in the SEVIS XML file produced during the SEVIS Export process. The SEVIS Export process controls and sequentially numbers the extract batch ID value with each new run.

Checklist Type

Checklist Type

Enter the checklist type that you want to use for associating a checklist with a communication. This checklist type is the only type that can be associated with a Comm Key. You associate the checklist type with a communication in the Checklist Table page.

NID Type for AD and FA Loads

National ID (NID) types and their formats are defined on the National ID Type Table page.

If the Default check box for an NID type is selected on the National ID Type Table page, the system uses that NID type as the default for the National ID Type field required when creating new people in your system. You can choose to set or not set a default NID type to use to populate this field when creating new people.

Because the NID Type field is required when creating new people in your system, the delivered Admission data load processes (such as ACT, ADA, AP, and so on) and the Financial Aid load processes (Financial Aid PROFILE, Need Access Process or Financial Aid ISIR) require a default National ID type. Use the National ID Type field in this group box to set a default National ID type for these processes to use if no default National ID type is selected on the National ID Type Table.

Country	The system displays the installation country specified on the Installation Table component (INSTALLATION_TBL3) page.
National ID Type	Enter the default value for Admissions and Financial Aid processes to use in the National ID Type field when no default value is selected on the National ID Type Table page. An NID value here is relevant only if your institution: 1. Uses the delivered Admission data load processes (such as ACT, ADA, AP, and so on) or the Financial Aid load processes (Financial Aid PROFILE, Need Access Process or Financial Aid ISIR). 2. Does not want to save a default National ID when creating new IDs for which no National ID is provided inside the data load.

Communication Preferences

Use this group box only if your institution supports multiple languages or multiple methods or both multiple languages and multiple methods for communications, and you want to give administrators and self-service users the opportunity to specify the language or method by which a student prefers to receive communications from you.

Warning! Only communications generated by the Communication Generation process can use communication preferences. No other delivered processes are configured to consider either language or method preferences.

This table lists the pages and page elements affected by the selections that you make in the Communication Preferencesgroup box.

Note. Pages whose object names that begin with SCC are administrator pages and pages whose object names begin with SS_CC are self-service pages.

Page	***Page Elements***
Communication Preferences page (SCC_COMM_PREF)	The Preferred Language field appears on this page when the Support multiple languagescheck box is selected on the Installation Default - CC page. The Preferred Communication Method field appears on this page when the Support multiple methods check box is selected. **Note.** If you do not take advantage of the communication preferences options, do not give your administrators security access to the administrative Communications Preferences page.
Languages page (SCC_LANGUAGES)	The Set Preferred Communication Language link appears when the Support multiple languages check box is selected on the Installation Default - CC page. The link transfers the administrative users to the Communication Preferences (SCC_COMM_PREF) page.
Communication Preferences page (SS_CC_COMM_PREF)	The Preferred Language field appears on this page when the Support multiple languagescheck box is selected on the Installation Default - CC page. The Preferred Communication Method field appears on this page when the Support multiple methods check box is selected on the Installation Default - CC page. **Note.** If you do not take advantage of the communication preferences options, do not give your self-service users security access to the self-service Communication Preferences page.
Languages page (SS_CC_LANGUAGES_L)	The Set Preferred Communication Language link appears on this page when the Support multiple languages check box is selected on the Installation Default - CC page. The link transfers the self-service user to the self-service Communication Preferences (SS_CC_COMM_PREF) page.
User Preferences (SS_CC_USER_PREF)	The Set Communication Preferences link appears on this page when either the Support multiple languages or Support multiple methods check box is selected or when both check boxes are selected on the Installation Default - CC page. The link transfers the self-service user to the self-service Communication Preferences (SS_CC_COMM_PREF) page.

Page	*Page Elements*
Personal Data Summary (SSS_PRSNLDATA_SUMM)	The Set Communication Preferences link appears on this page when either the Support multiple languages or Support multiple methods check box is selected or when both check boxes are selected on the Installation Default - CC page. The link transfers the self-service user to the self-service Communication Preferences (SS_CC_COMM_PREF) page.

Support multiple languages and **Language**

Select the Support multiple languagescheck box only if your institution sets up and supports more than one language for communications. Enter each language that your system is set to support.

Support multiple methods and **Communication Method**

Select the Support multiple methodscheck box only if your institution sets up and supports more than one method of communications. Enter each method.

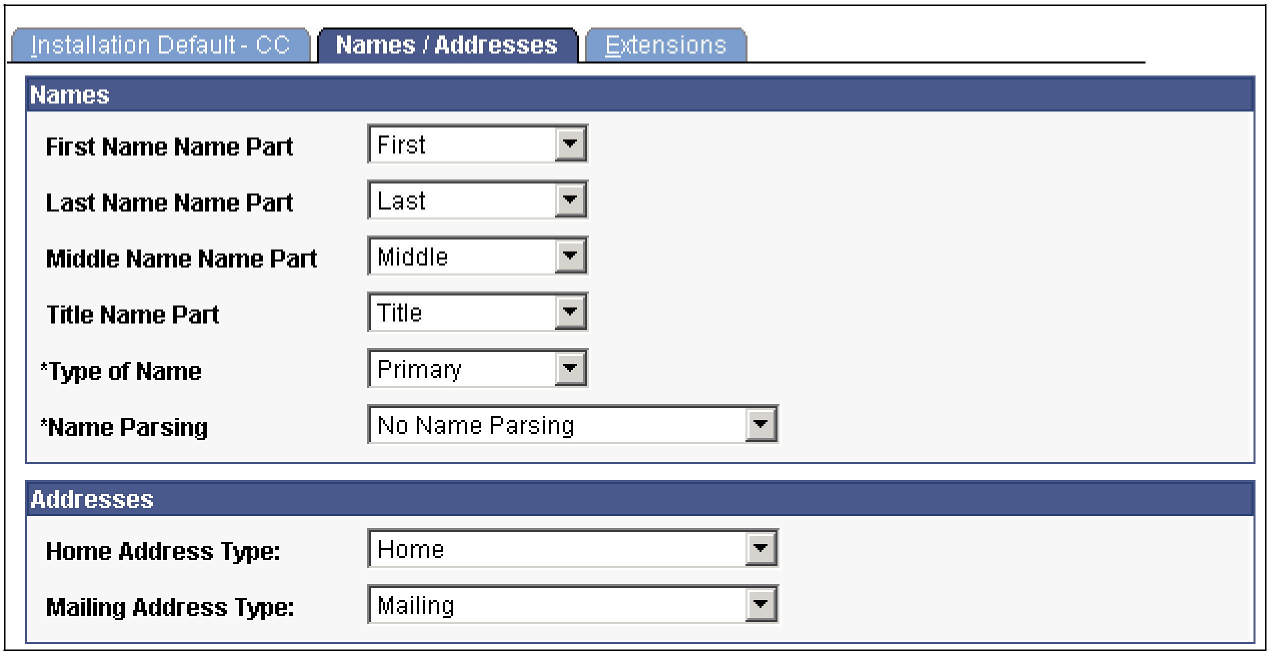
Note. As of the date of this publication, the Communication Generation process supports the methods of letters and emails only.

Allow Deletes from 3C Pages

Select the Person or Organization check boxes in this group box to allow users to delete individual communications, comments, and checklists for people, organizations, or both. To delete individual communications, comments, and checklists, click the trash can icon on the appropriate pages. Note that batch deletion is not affected by these settings and will delete items regardless of them.

Reviewing or Defining Default Installation Settings for Name and Address Types

Access the Names / Addresses page (Set Up SACR, Install, Campus Community Installation, Names / Addresses).



Names / Addresses page

Search/Match setup, Type Control functionality, various reports, and other functions throughout PeopleSoft Campus Solutions rely on values in the fields on this page, especially Type of Name, Home Address Type, and Mailing Address Type.

Names

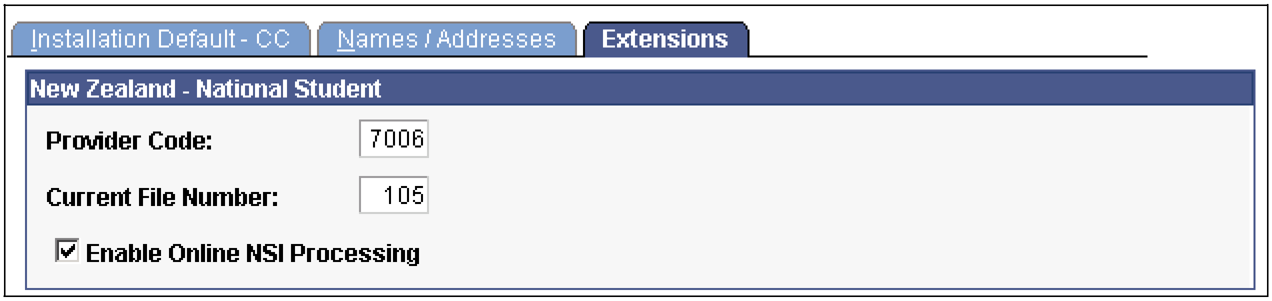
Type of Name	Select the name type that is the most important for your business processes to use as an individual's name.

Addresses

Home Address Type	Select the address type that is the most important for your business processes to use as an individual's home address.
Mailing Address Type	Select the address type that is the most important for your business processes to use as an individual's mailing address.

(NZL) Reviewing or Defining Default Installation Settings for National Student Index Processing

Access the Extensions page (Set Up SACR, Install, Campus Community Installation, Extensions).



Extensions page

In addition to setting installation values for NSI in Campus Community, you must turn on New Zealand functionality for Student Administration on the Installation Student Administration page.

New Zealand – National Student

Provider Code

Enter the code granted by Ministry of Education.

Current File Number

This number is used to create a unique extract file name to send to NSI. It is also tied to all individuals whose data needs to be sent to NSI. NSI Suspense Table, the Extract, Load, Post NSI Data batch processes and the Purge NSI Suspense Table process use this number.

Note. Every time the Extract NSI Data process is run, this number increases by increments of one. See the Extracting NSI Data section for more information on how the file number works.

Enable Online NSI Processing

Your institution must inform the MOE of changes made to student records in your database that have an NSN. By selecting this check box, PeopleCode triggers an insert action in the NSI Suspense table every time you make a change to these student's records to either their first name, last name, middle names, gender, date of birth, residential status, or to the verification fields for name/DOB or residential status. Then, the next time the Extract NSI process runs, it will extract the changed records and submit them to MOE.

Note. You must select this check box if your institution is required to report changes to individual NSI records. Those records with changes are sent as part of the NSI process, Update Insert Request.

Setting Up Campus Community and PeopleSoft HRMS Shared Elements

This section provides an overview of Campus Community and HRMS shared elements and references the PeopleSoft Human Resources 9.0 PeopleBooks that discuss how to:

- Set up name prefixes, suffixes, titles, and types.

- Set up address types.
- Administer country codes.
- Add the states or provinces for a country.
- Define national ID types.
- Define citizen status codes.
- Define ethnic groups.
- Set up visas and permits.
- Set up physicians.
- Set up diagnosis codes.
- Set up accommodation types.
- Set up regulatory regions.
- Set up language codes.
- Set up jobs.
- Define departments and locations.
- Set up licenses and certificates.
- Set up memberships.

Understanding Campus Community and PeopleSoft HRMS Shared Elements

Campus Solutions uses some functionality from PeopleSoft Human Resources Management (HRMS). If you have already licensed and implemented PeopleSoft HRMS, many of the setup tasks listed in this section might have been completed. If not, you should know that some values in Campus Community are defined using the HRMS pages, and that you should read about and set these up as described in the HRMS documentation. For example, country codes are delivered in Campus Solutions, but are set up and reside on an installation table in HRMS.

In addition, regulatory regions, job codes, job locations, job code tasks, accommodations, and disabilities are all set up on HRMS pages and appear on some pages in Campus Community. If your institution has licensed HRMS, you might require all of these fields, in which case your human resources administrators should read the HRMS documentation to set these up. Some of these fields might be optional in Campus Community. If you have licensed only Campus Solutions, you might still want to know about them and set them up.

This section lists the Campus Community and HRMS shared elements and provides cross-references to the appropriate HRMS documentation for detailed setup information.

Note. If you are implementing separate instances of PeopleSoft Campus Solutions and PeopleSoft HCM, you should read the additional documentation describing those integrations. Certain items and business processes that are detailed in this PeopleBook may vary depending on how you configure your separated systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Pages Used to Set Up Campus Community and PeopleSoft HRMS Shared Elements

Page Name	***Definition Name***	***Navigation***	***Usage***
Name Prefix Table	NAME_PREFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Prefix	Set up or review name prefixes.
Name Suffix Table	NAME_SUFFIX_TABLE	Set Up HRMS, Foundation Tables, Personal, Name Suffix	(Optional) Set up or review name suffixes for prompting pages with names data. Alternatively, you can manually include the suffix after the individual's last name on those pages.
Royal Name Prefix	NM_ROYAL_PREFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Prefix	Set up royal designations to precede a name.
Royal Name Suffix	NM_ROYAL_SUFFIX	Set Up HRMS, Foundation Tables, Personal, Royal Name Suffix	Set up royal designations to follow a name.
Name Title	TITLE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Title	Set up titles that go with names. Titles can be royal, political, religious, and so on.
Name Type Table	NAME_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Name Type	Define name types and the order in which to use them.
Address Type Table	ADDR_TYPE_TBL	Set Up HRMS, Foundation Tables, Personal, Address Type	Define address types and the order in which to use them.
Country Description	COUNTRY_DEFN	Set Up HRMS, Install, Country Table, Country Description	Review or update country descriptions and codes.
Address Format	ADDR_FORMAT_TABLE	Set Up HRMS, Install, Country Table, Address Format	Specify the address format for the country that is selected from the Country Table.

Page Name	**Definition Name**	**Navigation**	**Usage**
Valid Address page	EO_ADDR_VALIDAT	Set Up HRMS, Install, Country Table	Specify the county, state, and city for the country that is selected from the Country Table.
Country Table Report - Run Control page	PRCSRUNCNTL	Set Up HRMS, Install, Country Table Report	Run the Country Table report (PER708) that prints a list of all country character codes.
State or Province Table	STATE_DEFN	Set Up HRMS, Install, State/Province	Add a state, province or equivalent entity for the country that is selected from the Country Table.
National ID Type Table	NID_TYPE_TABLE	Set Up HRMS, Foundation Tables, Personal, National ID Type	Define or review default National ID values for a country.
Language Table	LANGUAGE_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Language Table	Define language codes.
Citizen Status	CITIZEN_STATUS	Set Up HRMS, Foundation Tables, Personal, Citizen Status	Define codes for country citizenship.
Supporting Document Table	SUPPORT_DOC_TABLE	Set Up HRMS, Common Definitions, Supporting Documents	Define identification codes for documents that are required to obtain I-9 verification for individuals.
Visa/Permit Table	VISA_PERMIT_TABLE	Set Up HRMS, Product Related, Workforce Administration, Visas/Permits	Define codes for visas and permits required for noncitizens and their dependents.
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups	Define ethnic groups.
Name (Physician Table)	HS_PHYSICIAN_DATA1	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table, Name	Enter or review the name of a physician or other medical professional in your database.

Page Name	Definition Name	Navigation	Usage
Address (Physician Table)	HS_PHYSICIAN_DATA2	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table, Address	Enter or review the address of a physician or other medical professional in your database.
Phone Number (Physician Table)	NE_PERS_DTAPH_SEC	Click the Phone link at the bottom of the Address (Physician Table) page.	Enter or review the phone numbers of a physician or other medical professional in your database.
Diagnosis Table	DIAGNOSIS_TABLE	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Diagnosis Table	Create or review codes for injuries and illnesses that your institution wants to track.
Accommodation Type Table	ACCOM_TYPE_TABLE	Set Up HRMS, Product Related, Workforce Administration, Labor Administration, Accommodation Type	Set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities.
Regulatory Region	REG_REGION	Set Up HRMS, Install, Regulatory Region	Define or review regulatory region descriptions and security access. Your system is delivered with regulatory regions predefined for Canada, the United States, Canadian provinces, and other areas. Use this page to set up additional regulatory regions.
Job Code Profile	JOBCODE_TBL1_GBL	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Table, Job Code Profile	Define or review job codes. Job codes are used on the Accommodation Job Task page within Campus Community.
Business Units by Location	LOC_BU_SEC	Click the business units that use this setID link on the Location Address page.	View a list of the business units that use this setID.

Page Name	Definition Name	Navigation	Usage
Location Address	LOCATION_TABLE1	Set Up HRMS, Foundation Tables, Organization, Location Table	Identify or review physical locations such as headquarters, satellite campuses, or remote recruiting offices. Job locations are used on the Accommodation Job Task page within Campus Community. **Note.** Do not confuse this location page with the Location Addresses page on which you set up campus location addresses.
Phone Number	BUS_PHONE_SEC	Click the Phone link on the Location Address page.	Enter a phone number and fax number for a physical location.
Job Code Task Table	JOBCODE_TASK_TABLE	Set Up HRMS, Foundation Tables, Job Attributes, Job Code Task Table	Define or review job tasks associated with a job code. Job code tasks are used on the Accommodation Job Task page within Campus Community.
Department Profile	DEPARTMENT_TBL_GBL	Set Up HRMS, Foundation Tables, Organization, Departments	Identify an internal business entity or department. Departments are used on the Service Indicator Data 1 and Org Comm Recipients pages within Campus Community.
License/Certification Table	LICENSE_CERTIF_TBL	Set Up HRMS, Common Definitions, Accomplishments, Licenses and Certifications	Set up licenses and certificates of interest to your institution.
Membership Table	MEMBERSHIP_TABLE	Set Up HRMS, Common Definitions, Accomplishments, Memberships	Create codes for the memberships that your institution wants to track.

Setting Up Name Prefixes, Suffixes, Titles, and Types

Set up name prefixes, suffixes, titles, and types in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Managing Profiles,"Creating and Updating Person Profiles

Setting Up Address Types

Set up address types in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up Personal Information Foundation Tables,"Defining Address Types

Administering Country Codes

Set up country codes in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Installing PeopleSoft HRMS,"Administering Country Codes

Adding the States or Provinces for a Country

Add states or provinces for a country in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Installing PeopleSoft HRMS,"Administering Country Codes, Adding the State, Province, or Equivalent Entity for a Country

Defining National ID Types

Define national ID types in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,* "Setting Up Personal Information Foundation Tables,"Assigning a National ID Type to a Country Code

Defining Citizen Status Codes

Define citizen status codes in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up Personal Information Foundation Tables,"Defining Citizen Status Codes

Defining Ethnic Groups

Define ethnic groups in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce,* "Setting Up the Administer Workforce Business Process,"Defining Additional Employment Setup Data, Defining Ethnic Groups

Setting Up Visas and Permits

Set up visas and permits in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce,*"Setting Up the Administer Workforce Business Process," Defining Employee Identification, Defining Visas and Work Permits

Setting Up Physicians

Set up physician codes in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Monitor Health and Safety,*"Setting Up Incident, Injury, and Illness Tracking,"Defining Medical Services Information, Entering Physician Information

Setting Up Diagnosis Codes

Set up diagnosis codes in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Monitor Health and Safety,*"Setting Up Incident, Injury, and Illness Tracking,"Defining Injuries and Illnesses, Defining Medical Diagnoses

Setting Up Accommodation Types

Set up accommodation types in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce,"Entering Additional Data in Human Resources Records,"*Tracking Disabilities, Documenting Disability Accommodations

Setting Up Regulatory Regions

Set up regulatory regions in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Installing PeopleSoft HRMS,"Setting Up Regulatory Regions

Setting Up Language Codes

Set up language codes in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Manage Profiles,*"Maintaining Profiles,"Creating and Updating Person Profiles

Setting Up Jobs

Set up jobs in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up Jobs"

Defining Departments and Locations

Define departments and locations in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up Organization Foundation Tables,"Maintaining Departments

Setting Up Licenses and Certificates

Set up licensees and certificates in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Manage Profiles,*"Maintaining Profiles,"Creating and Updating Person Profiles

Setting Up Memberships

Set up memberships in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Manage Profiles,* "Maintaining Profiles,"Creating and Updating Person Profiles

Establishing Name Usages

To establish name usages, use the Name Usage Table component (NAME_USAGE_TABLE).

This section provides an overview of name types and usages and discusses how to define name usage types:

Understanding Name Types and Usages

Names are important when maintaining data about and communicating with individuals. You should configure names in your database for consistent use across your institution. To configure names, use name parts (first, middle, and last name), name types to define a name (for example, legal, maiden, primary, or preferred) and name usages to identify the order in which the name parts will be presented for that type.

Define name prefixes and suffixes (use HRMS setup pages) to further identify and address individuals in your campus community. Standard prefixes (Mr, Mrs, and Miss) and suffixes (Esq, MD, PhD) are predefined. You can set up additional prefixes or suffixes, including royal prefixes and suffixes.

See *PeopleSoft Application Fundamentals for PeopleSoft HRMS 9.0 PeopleBook,*"Setting Up Additional Name Information"

PeopleSoft delivers name format configurations that are preformatted and preparsed based on country. When you enter the format code on the Names page, the system provides name fields in the predefined format.

The following list shows the name fields and the order in which they appear for each name format. After you enter the name parts and save the record, the system displays the name, concatenated according to the specified format, in the Name field.

Country	***Name Part***
(BEL) Belgium	• Name • First Name • Last name • Initials • Preferred First Name • Title
(BZL) Brazil	• First Name • Middle Name • Last Name • Preferred First Name
(CHE) Switzerland	• Name • Name Prefix • First Name • Middle name • Last name • Name Suffix
(CHN) China	• Prefix • First Name • Middle Name • Last Name • Suffix
(DEU) Germany	• Prefix • Royal Prefix • Name • Title • First Name • Last Name • Royal Suffix

Country	**_Name Part_**
(ESP) Spain	• Name • Name Prefix • First Name • Last Name • Second Last Name
(FRA) France	• Name Prefix • First Name • Middle Name • Last Name
(HGK) Hong Kong	• Name Prefix • First Name • Preferred First • Middle Name • Last name • AC Name
(ITA) Italy	• Name • Name Prefix • First Name • Last Name
(JPN) Japan	• Name • Last Name • First Name • Name Alternate Character
(MEX) Mexico	• Name Prefix • First Name • Last Name • Second Last

Country	Name Part
(NLD) Netherlands	• Name • Name Prefix • First name • Last Name • Preferred First name • Initials • Title
English (USA and all others)	• Name • First Name • Middle Name • Last Name • Name Prefix • Name Suffix

To create usages and define the name parts for each usage, define hierarchical orders by which to search for other name types in case the name type that you specify does not exist for an individual. For example, you might create a usage of *Admit* for sending an admissions letter to an applicant. You might want to search for and use the individual's preferred first name. If no data exists for that name type, you might then want to search for and use the individual's formal name, and so on. You can create general or specific usages and specify one name type or a hierarchy of many name types within each usage.

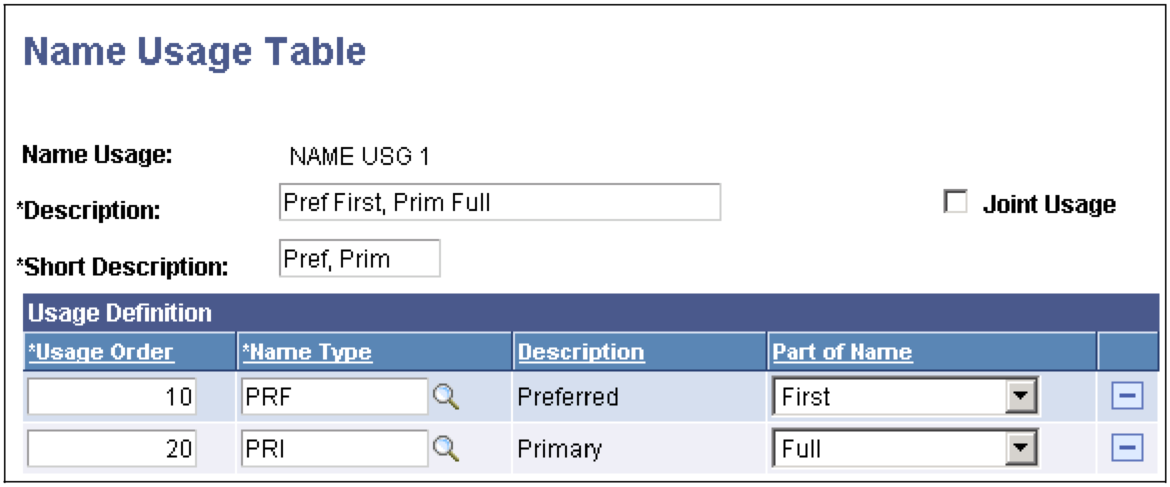
Arrange name types in the order that they should appear in an application. For example, when you print an admissions letter and envelope, the applicant's name appears first in the salutation of the letter and then on the envelope. If you select the *Admit* usage previously described, the preferred first name (first in the hierarchical order) appears first (Dear Dave), and the formal name next in the hierarchical order appears next (David Miller).

Page Used to Set Up Name Usages

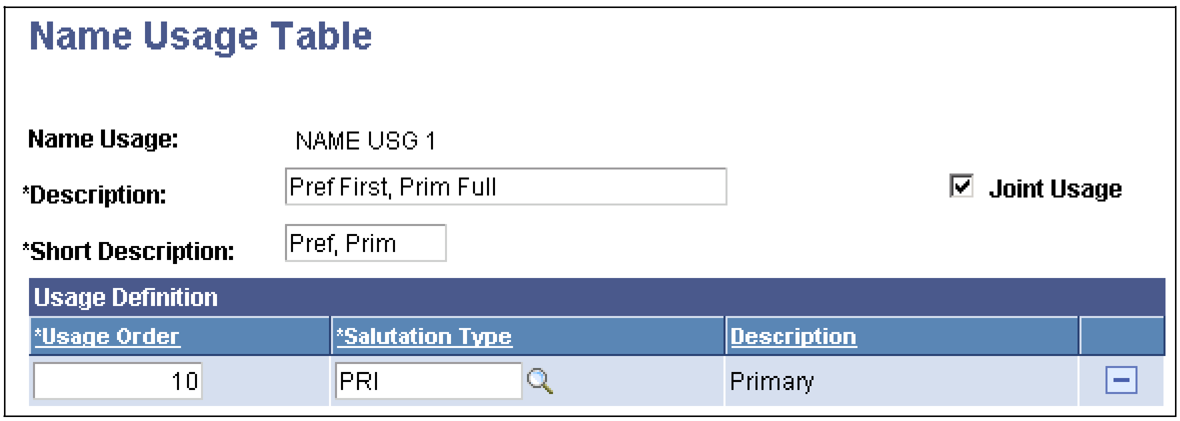
Page Name	Definition Name	Navigation	Usage
Name Usage	NAME_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table	Define name usages to specify the hierarchies of name types that you want to use in a specific usage.

Defining Name Usages

Access the Name Usage page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table).



Name Usage page (1 of 2) without Joint Usage selected



Name Usage page (2 of 2) with Joint Usage selected

Warning! The Name Usage Table is a fundamental table shared across all applications in PeopleSoft Campus Solutions. Coordinate carefully with other departments to define and update the Name Usage table to ensure that these values meet the needs across your institution.

Joint Usage	Select this check box to set this name usage for joint communication, or clear the check box to set it for general name usage. The elements that appear in the Usage Definition area of the page vary depending on whether you select the Joint Usage check box. If the Joint Usage check box is selected, the Salutation Type field becomes available. Create joint usages if your institution uses the Joint Communication Management feature. The joint name usages are used to define what salutation type you want to use on a letter sent jointly to two individuals when you use the letter generation process.

Usage Definition

Usage Order	Displays the order in which the system will search for and use the associated data. The system displays the sequential usage order each time that you add a new row. You can change the numbers to rearrange the order in which the system searches for and uses the name or salutation types.
Name Type and **Part of Name**	If Joint Usage is not selected, the Name Type and Part of Name fields appear. Enter the type of name to use and select the name part to use within the specified name type.
Salutation Type	If Joint Usage is selected, the Salutation Type field appears.
Salutation Type	Enter the salutation type for which you want the system to search. Salutation types are defined on the Joint Communications page.

Establishing Name Type Defaults

To establish name type defaults, use the Name Type Defaults component (NAME_TYPDFLT_TABLE).

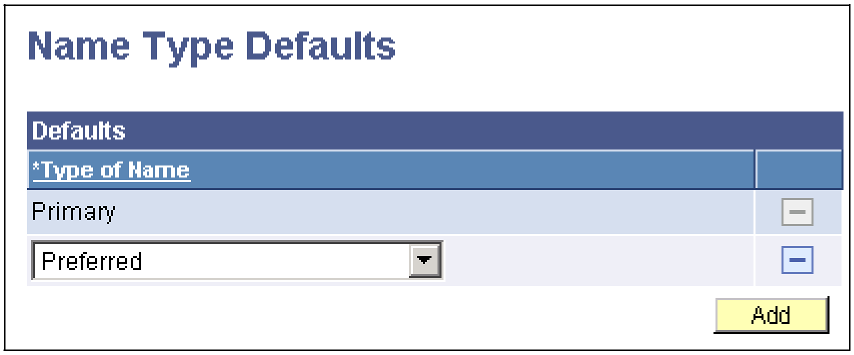
This section discusses how to establish the name types to create by default when adding a new person ID.

Page Used to Establish Name Type Defaults

Page Name	*Definition Name*	*Navigation*	*Usage*
Name Type Defaults	NAME_TYPE_DFLT_TBL	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Type Defaults	Define name types to create by default when adding a new person ID (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Type Defaults).

Defining Name Type Defaults

Access the Name Type Defaults page.



Name Type Defaults page

Add each name type that your institution wants a user to define when they create a personal record for an individual.

Establishing Salutations

To establish salutations, use the Salutation Table component (SALUTATION_TABLE) and Joint Salutation Type Table component (SALU_TYPE_SETUP).

This section provides an overview of salutations and discusses how to:

- Create salutations.
- Define salutation types for joint communications.

Understanding Salutations

You can set up salutations and salutation types for use in generating communications. The salutation types that you define are available for use on the Joint Communication Management page in the Relationship component. You can reduce joint communications data entry by setting fields within a salutation type to define how two names will appear in the address and the greeting of a joint communication.

For example, if you select the salutation type of *Primary* select the Two separate lines check box, and define and format the name type as *Primary*. Then, when you select the salutation of *Primary* on the Joint Communication Management page, the system places each of the two individual's (primary) names on separate lines.

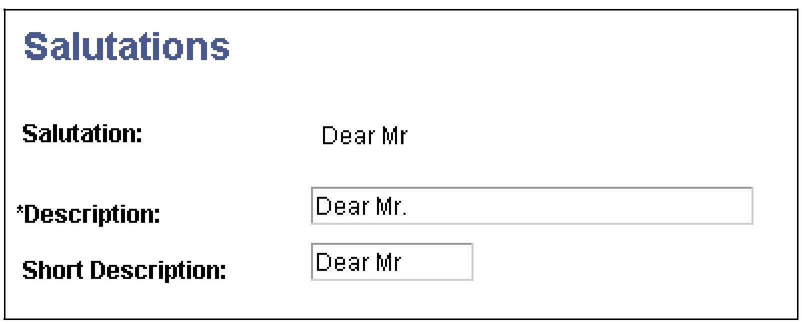
Also use salutation setup to maintain consistent use of a salutation type, assuring that all users entering data for joint communications use the same rules to enter the names. For example, if you set up a salutation type of *Friend* and define it to use only the individuals' first names, users can use the *Friend* salutation type to consistently use the same more personal greeting where appropriate in joint communications.

Pages Used to Set Up Salutations

Page Name	***Definition Name***	***Navigation***	***Usage***
Salutations	SALUTATION_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Salutation Table	Create the salutations to make available in your system. The Joint Salutation Type Table page uses salutations created here.
Salutation Type for Joint Communications	SALU_TYPE_SETUP	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Joint Salutation Type Table	Define salutation types to make available for joint communications. The Joint Communication Management page (in the Relationships component) and the Name Usage page use the salutation types created here.

Creating Salutations

Access the Salutations page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Joint Salutation Type Table).

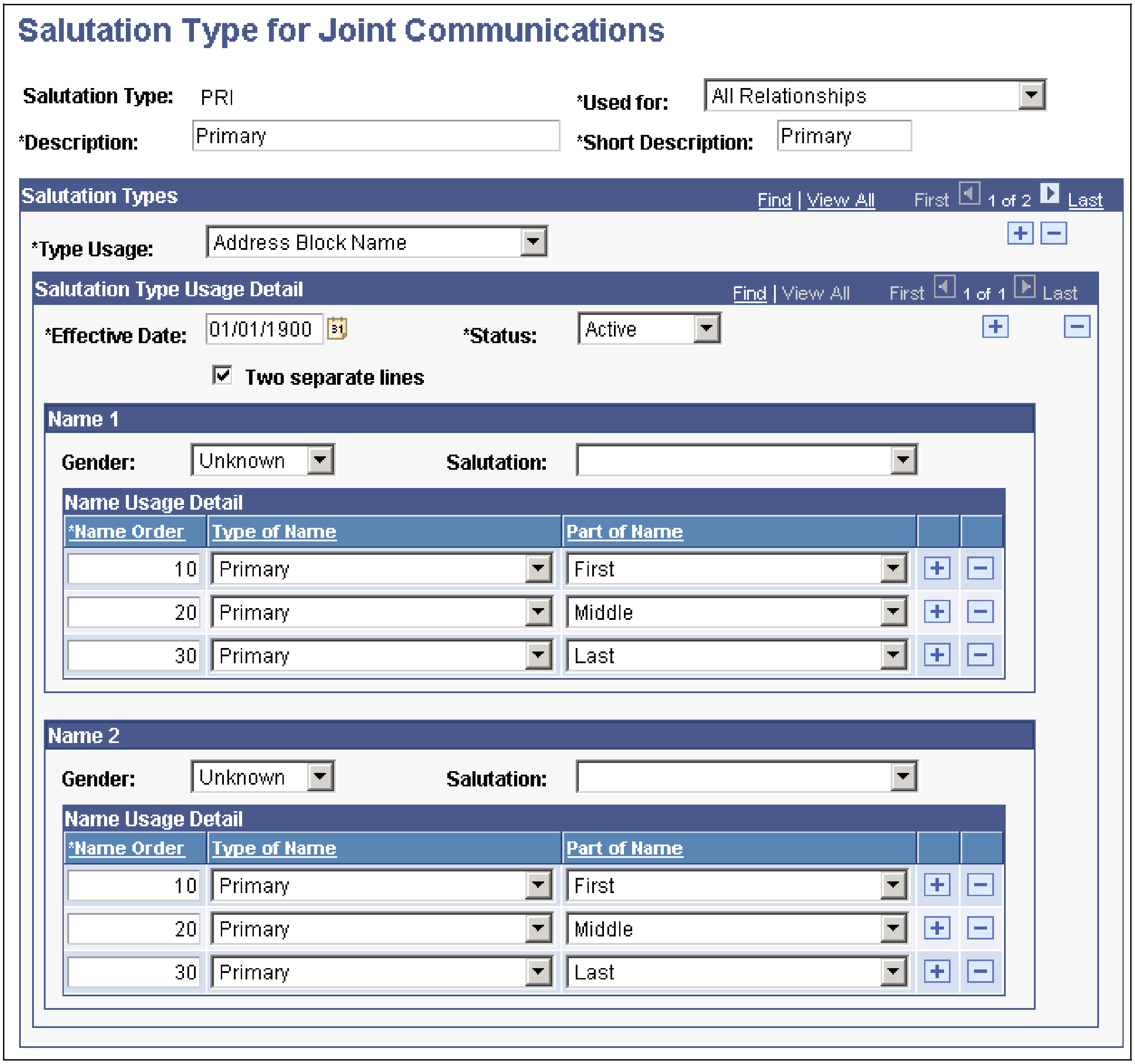


Salutations page

Note. When you create a salutation, do not include punctuation in the salutation.

Defining Salutation Types for Joint Communications

Access the Salutation Type for Joint Communications page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Joint Salutation Type Table).



Salutation Type for Joint Communications page

Used For	Select the relationship *(All Relationships* or *Spouse Only)* for which this salutation should be available on the Joint Communication Management page. For example, if you specify *All Relationships,* this salutation will be available for all. If you are setting up a joint salutation format that will create something like *Mr. and Mrs. Smith*, select *Spouse Only* to make this salutation a valid choice only when a spousal relationship exists.

Salutation Types

Type Usage

Select the area of the joint communication where this salutation type should be used. For each salutation type that you create, set up one *Address Block Name* usage and one *Salutation* usage.

Address Block Name: The salutation that appears in the address area of the joint communication.

Salutation: The salutation that appears in the greeting of the joint communication.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Salutation Type Usage Detail

Two separate lines

Select this check box to print each of the two names on a separate line for this salutation. For example:

John Smith

Mary Fletcher

Name 1; Name 2

Use fields in the Name 1 and Name 2 areas to configure each name for this joint communication salutation type.

Warning! Select gender and salutation carefully for each name. If you select a salutation directed to a specific gender and neither individual in the relationship is that gender, you could inadvertently offend the recipients. For example, if you select the gender of *Female* and the salutation of *Dear Ms.* but neither individual in the relationship is female, the result might be *Dear Ms. Robert Smith and David Jones.*

Using the Salutation Type for Joint Communications page reduces data entry only. Users should always validate that the names are correct and that the salutations reflect the appropriate genders.

Gender

Use gender to control the order in which the recipient names appear in this salutation.

Female: The system places the female name first in the salutation.

Male: The system places the male name first.

Unknown: The system places the names in the order in which they are listed in the Relationships component and based on the gender specified for the individual on the Biographical Details page.

If you do not specify a gender, the system places the primary ID name first and the related ID name next.

Salutation

Select the salutation opening (for example, *Dear Mr.*, *Dear Ms.*, or *Mr. and Mrs)* to precede this Name 1 or Name 2 individual's name.

For example, if you select *Dear Mr.* for Name 1 and *Dear Mrs.* for Name 2, and you selected the two separate lines check box, the salutation would look like this:

Dear Mr. John Smith

Dear Mrs. Mary Fletcher

Name Usage Detail

Name Order

Displays the order in which the system searches for and uses the associated data. The system assigns the next sequential usage order each time that you add a new row.

You can change the numbers to rearrange the usage order.

Type of Name

Select the type of name for which to search.

Part of Name

Select the name part for which to search within the specified name type.

Establishing Address Usages

To establish address usages, use the Address Usage Table component (ADDR_USAGE_TABLE).

This section provides an overview of address usages, and discusses how to define or review address usages.

Understanding Address Usages

Addresses are as fundamental as names to tracking people in your database. It is important to be able to maintain multiple addresses and phone numbers for an individual, including electronic addresses and campus locations.

Define sets of address types that you routinely want to search for and use for a specific business purpose. For example, if you're sending an admissions letter, you might want to use the individual's home address for the correspondence. If no data exists for the home address type, you might want to search for and use the individual's mailing address. If no data exists for the mailing address, you might want to search for and use the individual's permanent address type, and so on.

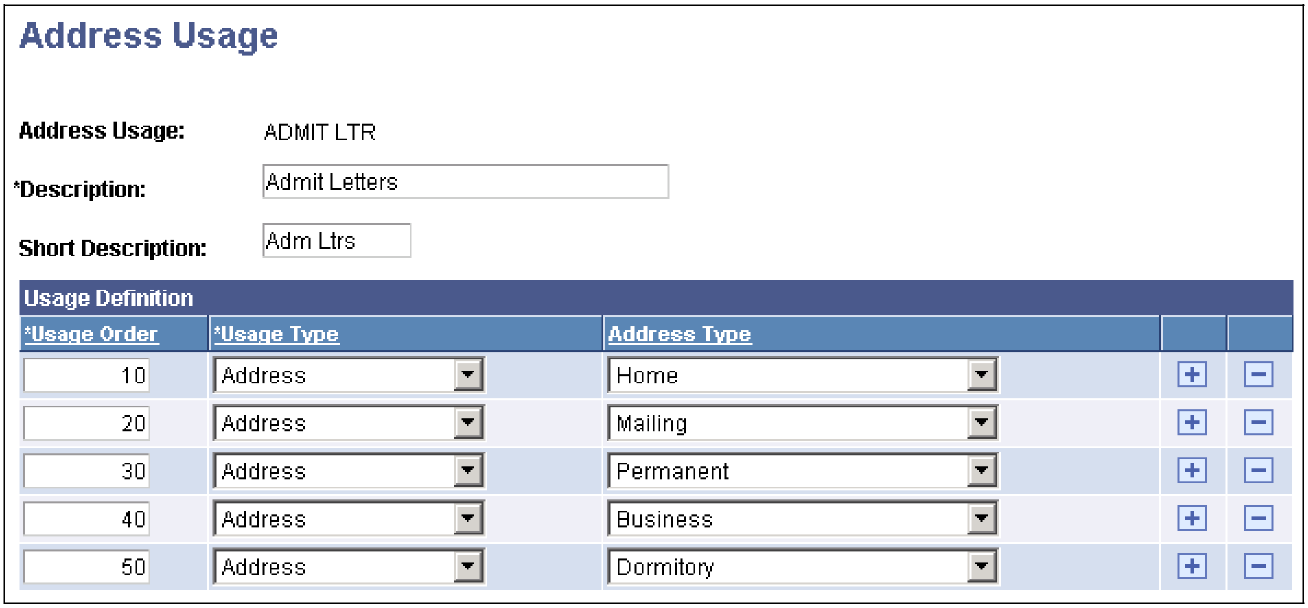
You can enter specific campus addresses and physical locations (headquarters, satellite campuses, and remote recruiting offices) to indicate where to contact students or staff at your institution or to specify locations where classes and other events are held.

Page Used to Establish Address Usages

Page Name	*Definition Name*	*Navigation*	*Usage*
Address Usage	ADDR_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table	Define or review address usages by specifying hierarchies of address types to search for and use in a specific usage.

Defining or Reviewing Address Usages

Access the Address Usage page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table) .



Address Usage page

Warning! The Address Usage Table is a fundamental table shared across all applications in PeopleSoft Campus Solutions. Coordinate with other departments to define and update the Address Usage table to ensure that these values meet the needs across your institution.

Usage Order

Displays the order in which the system searches for and uses the associated data. The system displays the sequential usage order each time that you add a new row.

You can change the numbers to rearrange the usage order.

Usage Type	Enter either the usage type (for example, *Address* or *Email*) to identify how the address type to search for is used. Values for this field are delivered with your system as translate values. Except for *Home* and *Mail,* you can modify these translate values. **Note.** When the Usage Type is *Email,* the system extracts the specified email address, but it does not produce or send an email communication.
Address Type	Appears when the usage type is *Address.* Select the type of address to search for (for example, *Billing, Home,* or *Mailing*). Values for this field are delivered with your system as translate values. Except for *Home* and *Mail,* you can modify these translate values.

Establishing Phone Usages

To establish phone usages, use the Phone Usage Table component (PHONE_USAGE_TABLE).

This section provides an overview of phone usage types, and discusses how to define or review phone usage types.

(CAN) Understanding Phone Usages

If your system's installation country is *CAN,* phone usage values are used for ESIS Current phone reporting.

To create an address usage for ESIS Current address reporting:

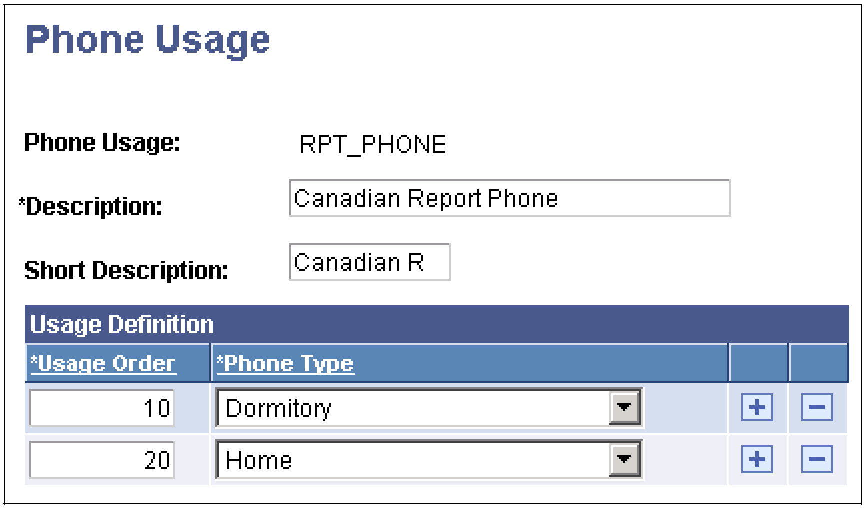
1. Access the Phone Usage page.
2. Add an Address Usage of *RPT_PHONE.*
3. In the Description field, enter *Phone Priority for Cdn Rpts.*
4. In the Short Description field, enter *Cdn Reports.*
5. Using the Usage Ordr and Phone Type fields, insert rows for all phone usage types.

Page Used to Establish Phone Usage Types

Page Name	***Definition Name***	***Navigation***	***Usage***
Phone Usage	PHONE_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table	Define Canadian (CAN) reporting phone usage values for ESIS (Extended Student Information System) reporting.

Defining Phone Usage Types

Access the Phone Usage page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Phone Usage Table).



Phone Usage page

Usage Order

Displays the order in which the system searches for and uses the associated data. The system displays the sequential usage order each time that you add a new row.

You can change the numbers to rearrange the usage order.

Phone Type

Enter the phone type to search for (for example, *Dormitory*, *Home*, or *Mailing*).

Values for this field are delivered with your system as translate values. Except for *Home* and *Mailing*, you can modify these translate values.

Establishing Campus Locations

To establish campus locations, use the Location Address Table component (LOC_ADDR_TABLE).

This section discusses how to define campus addresses for your institution.

Page Used to Define Campus Locations

Page Name	*Definition Name*	*Navigation*	*Usage*
Location Addresses	LOC_ADDR_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Location Address Table	Define or review campus addresses for your institution.

Defining Campus Addresses

Access the Location Addresses page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Location Address Table).

Location Addresses

Note. Be careful not to confuse this page with the HRMS Job Locations - Location Address page, on which you set up job locations at your institution.

Enter address information for this campus location.

Establishing ID Delete Control

You can establish priority data to control and prevent the deletion of individual records in your system.

Establishing Search/Match Criteria

You can establish criteria and search orders to detect and identify duplicate records in your system.

Establishing FERPA Privacy Control

You can specify the data that your institution must control to comply with the U.S. FERPA (Family Educational Rights and Privacy Act) regulation and with any other internal privacy policies that your institution might have.

Establishing 3C Deletion Policy Control

This section discusses how to:

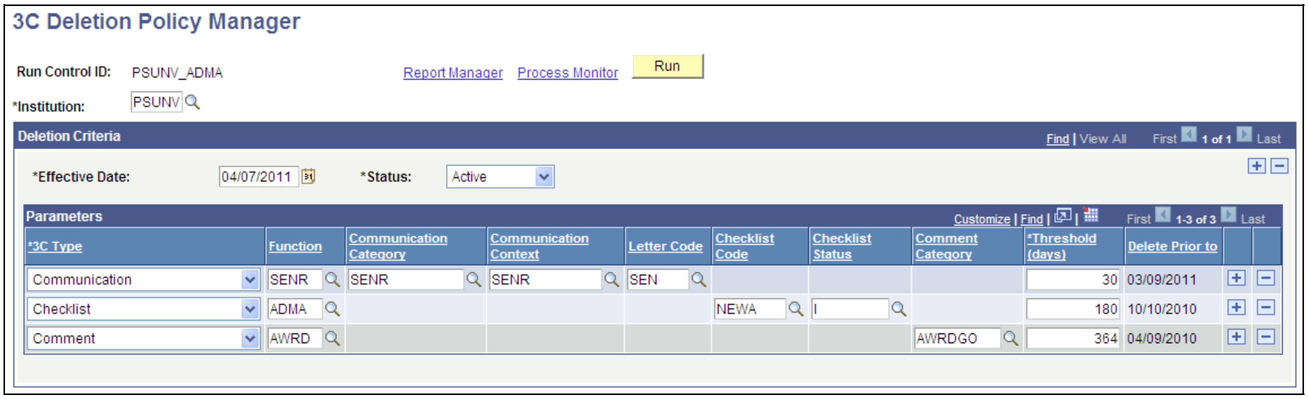
- Set 3C deletion policy parameters.
- Set 3C deletion policy exceptions.

Pages Used to Establish 3C Deletion Policy Control

Page Name	***Definition Name***	***Navigation***	***Usage***
3C Delete Policy Manager	SCC_3CD_POL_MGR	Set Up SACR, Common Definitions, 3C Deletion, 3C Deletion Policy Manager	Set broad parameters for 3C deletion so that the system can then automatically identify and delete them with authorization.
3C Deletion Exceptions	SCC_3CD_EXCEPTION	Set Up SACR, Common Definitions, 3C Deletion, 3C Deletion Exceptions	Identify service impacts that the system must consider as exceptions to 3C deletion processes.

Setting 3C Deletion Policy Parameters

Access the 3C Delete Policy Manager page (Set Up SACR, Common Definitions, 3C Deletion, 3C Deletion Policy Manager).



3C Deletion Policy Manager

Run Control ID: PSUNV_ADMA Report Manager Process Monitor Run

*Institution: PSUNV

Deletion Criteria Find | View All First 1 of 1 Last

*Effective Date: 04/07/2011 *Status: Active

Parameters Customize | Find | First 1-3 of 3 Last

*3C Type	Function	Communication Category	Communication Context	Letter Code	Checklist Code	Checklist Status	Comment Category	*Threshold (days)	Delete Prior to
Communication	SENR	SENR	SENR	SEN				30	03/09/2011
Checklist	ADMA				NEWA	I		180	10/10/2010
Comment	AWRD						AWRDGO	364	04/09/2010

3C Deletion Policy Manager page

The fields on this page change depending on the 3C Type selected. Your institution's deletion parameters can be as broad or as narrowly defined as necessary. Aging thresholds can be set that apply to any 3C, using the Threshold (days) field. For example, financial aid communications may need to be kept longer than prospect inquiry responses and that can be reflected in this setup.

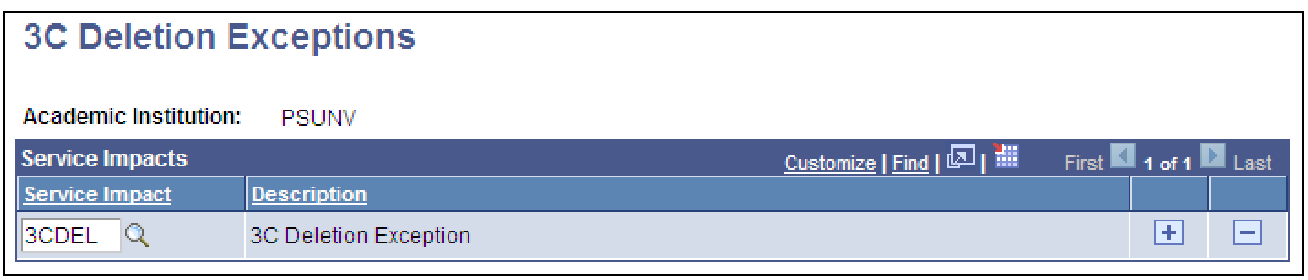
Unlike batch 3C deletion or individual deletion of communications, checklists and comments, which are controlled by 3C Group security, access to this page is controlled by PeopleTools permission lists to limit its exposure. Please note that 3C Group Security does not apply to the 3C Deletion Policy Manager.

When you click the Run button, the system runs the 3C Delete - Policy Manager Application Engine process (SCC_3CD_PMGR). The process sweeps through the 3C records and deletes target items and their related record rows, following the parameters set on this page.

In exceptional circumstances it may be necessary to identify particular EmplID's 3C items that the 3C Delete - Policy Manager process should avoid. You can use the 3C Deletion Exceptions page to attach a service impact via a service indicator to the EmplID's record.

Setting 3C Deletion Policy Exceptions

Access the 3C Deletion Exceptions page (Set Up SACR, Common Definitions, 3C Deletion, 3C Deletion Exceptions).



3C Deletion Exceptions

Academic Institution: PSUNV

Service Impacts Customize | Find | First 1 of 1 Last

Service Impact	Description
3CDEL	3C Deletion Exception

3C Deletion Exceptions page

Service impacts identified here are recognized by the 3C deletion process as indicating EmplIDs whose 3C items are to be excepted from deletion. Note that to apply such exceptions, a service indicator that references a service impact listed here, must be applied to an EmplID.

Service impacts are defined on the Service Impact Table page. Service indicators that refer to a service impact, and would be associated with the EmplID to be exempted, are defined on the Service Indicator Table component.

Chapter 3

Setting Up ID Delete Control

This chapter provides an overview of setting up ID delete control, lists common elements, and discusses how to:

- Control the deletion of individual IDs.
- Control the deletion of organization IDs.

Understanding ID Delete Control

The ID Delete Control feature enables you to define priority data records to prevent users from deleting IDs with data on which others at your institution might rely. With priority data in place, the system will not permit users to delete an ID for which that data exists. A system administrator, or other user with proper security, can review the key data and then, if required, delete the ID.

PeopleSoft delivers predefined ID delete control priority tables and fields for individual and organization IDs. Corresponding messages are preset to appear when you try to delete an ID with data in any of the associated control records and fields.

Note. You should *not* modify the predefined ID delete controls. You can, however, define additional priority data by adding other records and fields to control the deletion of IDs.

Common Elements Used in This Chapter

Record (Table) Name — Displays the name of the record that contains the priority data field.

Field Name — Displays the name of the field that, when data exists in it, prevents the deletion of the ID.

Message Set Number — Enter the set number of the message to display when data exists in the priority data field.

Message Number

Enter the number of the message to display when data exists in the priority data field.

Warning! If you need to create user-configurable messages, create them in Message Sets 20,000-29,000 to prevent the system from overwriting them.

Note. The short description for many message numbers is the same. Review the detailed description associated which each message number in the PeopleTools Message Catalog to determine which message number displays the desired message regarding the specific field.

Controlling the Deletion of Individual IDs

To control the deletion of individual IDs, use the ID Delete Control (ID_DEL_PRVNT_TABLE) component.

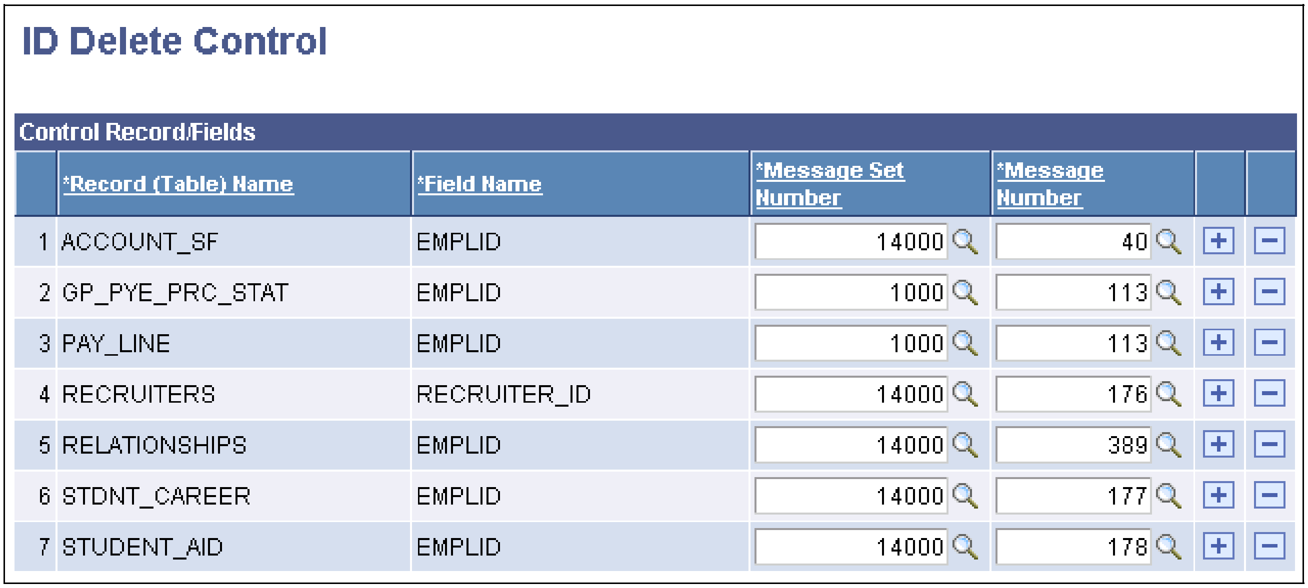
This section discusses how to define priority data to control the deletion of individuals IDs.

Page Used to Control the Deletion of Individual IDs

Page Name	*Definition Name*	*Navigation*	*Usage*
ID Delete Control	ID_DEL_PRVNT_TABLE	• Set Up SACR, System Administration, Database Processing, ID Delete Control • Campus Community, Personal Information, ID Management, ID Delete Control	Define priority data to control the deletion of individual IDs from your database.

Defining Priority Data

Access the ID Delete Control page (Set Up SACR, System Administration, Database Processing, ID Delete Control).



ID Delete Control

Control Record/Fields

	*Record (Table) Name	*Field Name	*Message Set Number	*Message Number
1	ACCOUNT_SF	EMPLID	14000	40
2	GP_PYE_PRC_STAT	EMPLID	1000	113
3	PAY_LINE	EMPLID	1000	113
4	RECRUITERS	RECRUITER_ID	14000	176
5	RELATIONSHIPS	EMPLID	14000	389
6	STDNT_CAREER	EMPLID	14000	177
7	STUDENT_AID	EMPLID	14000	178

ID Delete Control page

The ID on each of the following control records and the associated messages are delivered predefined as priority data:

- ACCOUNT_SF
- RECRUITERS
- RELATIONSHIPS
- STDNT_CAREER
- STUDENT_AID

Note. The GP_PYE_PRC_STAT and PAY_LINE priority data are used in HRMS.

You should not delete any of the rows of predefined control records. Keep these as your base ID delete control records for individual IDs and define additional priority data as necessary.

To define an additional control record, or to add an additional field from the same record, click the Plus button at the level where you want to add it. The system enters a new row and renumbers the sequence of control records. Select the record name, field name, and message data. The new row is not added until you click Save.

Controlling the Deletion of Organization IDs

To control the deletion of organization IDs, use the Organization Delete Control (ORG_DEL_PRVN_TABLE) component.

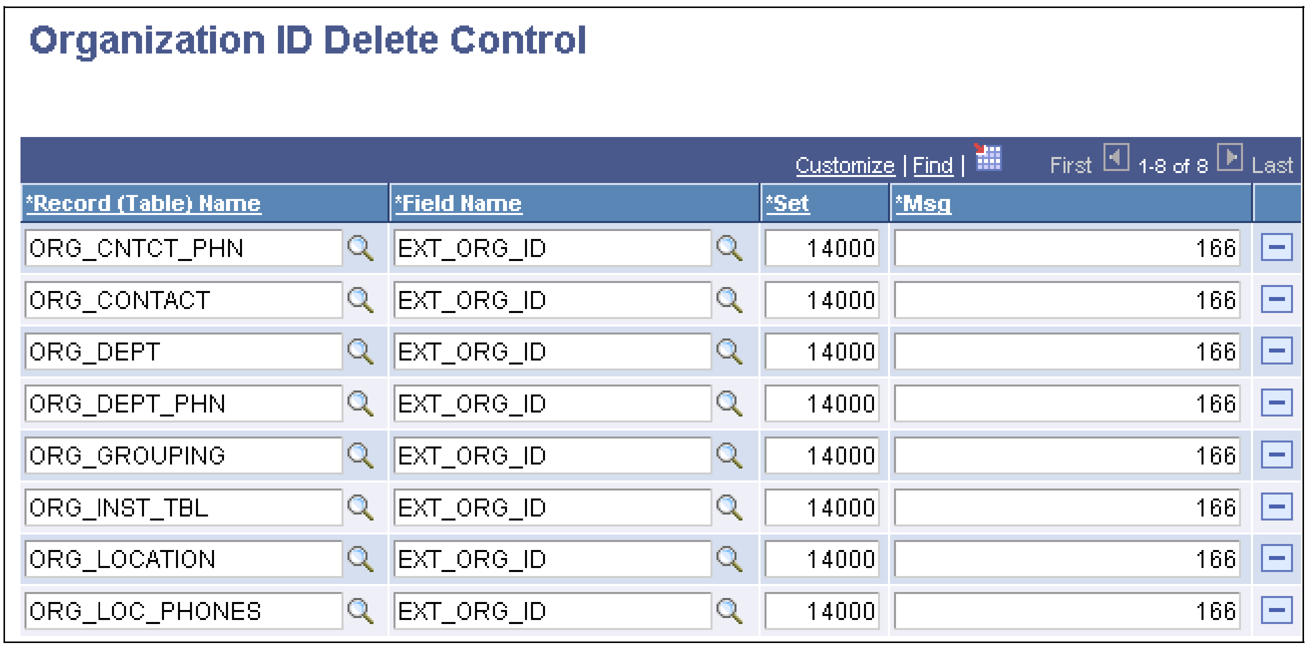
This section discusses how to define priority data to control the deletion of organization IDs.

Page Used to Control the Deletion of Organization IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
Organization ID Delete Control	ORG_DEL_PRVN_TABLE	Campus Community, Organization, Define Organization Data, Organization ID Delete Control	Define priority data to control the deletion of organization IDs in your database.

Defining Priority Data

Access the Organization ID Delete Control page (Campus Community, Organization, Define Organization Data, Organization ID Delete Control).



Organization ID Delete Control page

The ID field on each of the following control records and the associated messages are delivered predefined as priority data:

- ORG_CNTCT_PHN
- ORG_CONTACT
- ORG_DEPT
- ORG_DEPT_PHN
- ORG_GROUPING
- ORG_INST_TBL

- ORG_LOCATION
- ORG_LOC_PHONES

You can delete any of the rows of predefined control records. However, you should keep these as your base ID delete control records for organization IDs and define additional priority data as necessary.

To define additional priority data rows, click Add. The system adds a new row at the bottom of the page. Select the record name, field name, and message data. The new row is not added until you click Save.

Chapter 4

Setting Up Search/Match

This chapter provides an overview of PeopleSoft's Search/Match functionality and discusses how to set up Search/Match.

Understanding Search/Match

To use the full functionality of your system, you must maintain the integrity of your database. With users from many departments entering data, you want to minimize the entry of duplicate or multiple records. Search/Match enables you to define criteria to check for duplicate or multiple ID records. The searchable ID types (called Search Types) are:

- Person (EmplID).
- Organization (organization IDs within PeopleSoft Campus Solutions).
- Applicant (HRS_PERSON_ID within PeopleSoft HRMS Talent Acquisition Manager).

Note. PeopleSoft delivers these ID types as translate values inside the SM_TYPE field. They are delivered as *Active,* but you can inactivate them depending on the applications that you license. Do not, however, add or delete ID type values.

For each of the three ID types, departments or business areas can, based on user security roles, define their own search criteria to perform a search. The criteria can include defining search rules and placing them in the desired order within a search parameter. Each department or business area can also set what data to display in the results to identify a possible matching ID. Departments and business areas can set up multiple search result codes and give security access to all users or restrict it to specific users who have a certain security role assigned.

You can also set rules and parameters to permit only ad hoc searches to enable users with the appropriate security, to perform custom searches without the constraints of predefined criteria.

Data returned in a search result can contain sensitive information. You can control whether to entirely or partially mask a field or display the entire field. The masking configuration can be controlled with user security access. With search results and display controls defined, users can perform Search/Match to determine if a record already exists before adding one.

You can also enforce the use of Search/Match by setting Search/Match to trigger when a user enters data and saves a new ID. You can choose to either display a warning message alerting the user that at least one ID in the database matches the data entered, or transfer the user directly to the list of IDs that match the criteria. When you enforce Search/Match at save time, the user does not need to navigate to the Search/Match component and re-enter the data to determine whether the ID exists.

You define search rules to identify which fields to search for and how to use them to perform the search. You can use one or multiple search rules. If you use multiple search rules, Search/Match applies the rules in the order that you define. Starting with the first rule, if the system finds at least one match according to that rule, it will stop searching. However, if it finds no match for that rule, it will continue to the next rule, and so on.

Also, if you use multiple search rules, you should order the rules from the most restrictive to the least restrictive. For example, rule 1 could return matching IDs when first name, last name, phone number and national ID exactly match. Rule 4 could return matching IDs when only the first and last name match. In this example, rule 4 could return more potential matching IDs than rule 1. The search rule used by Search/Match could therefore be used as an indicator to users of how significant the returned results are.

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.

When a user runs the search, the system searches according to these rules and search orders until it either encounters a potential duplicate or executes all search sequences and finds no potential duplicate.

Use search result codes to specify the data that you want Search/Match to return in the grids on the Search Results page for the potential matching IDs that it finds. You can define field-level security for fields that you consider sensitive. For example, you might allow some users to see the full birth date, but restrict other users to see only the year (or nothing at all), depending on the Primary Permission List in their user profile.

Some search rules, search parameters, and search results are delivered with your system. You can use these as they are, modify them, or add as many as you need.

Warning! Adding new search fields require significant programming effort and is not recommended.

In Campus Solutions, Search/Match is called inside these batch programs when loading data into your system:

Application Engine Programs:

- Search/Match/Post Test Scores (SAD_TEST_PST).
- CBAP Post (SAD_CPST_AE).

COBOL Program: ISIR Load process (FAPSAR00.cbl, FAPSARRC.cbl, and FAP00SLD.cbl).

SQR Programs:

- Search/Match/Post Process (ADTRNPST.SQR and ADAPPPST.SQR).
- Profile Load (FAPFIN04.SQR and FAPFIN05.SQR).
- Profile Suspense Recycle (FAPFSR04.SQR and FAPFSR05.SQR).
- Profile Suspense Move (FAMVPF04.SQR and FAMVPF05.SQR).
- Need Access Load (FANAIN04.SQR and FANAIN05.SQR).
- Need Access Suspense Recycle (FANASR04.SQR and FANASR05.SQR).
- Need Access Suspense Move (FAMVNA04.SQR and FAMVNA05.SQR).

SQR programs are limited to a maximum of 40 search fields inside a single search rule and a maximum of 30 search rules inside a search parameter. Cobol programs and application engine programs do not have these limitations.

Understanding Automatic Search

Automatic search reinforces the use of Search/Match when you create a new ID in a transaction page. To trigger an automatic search from the transaction page, associate the component that contains that page with an active search parameter. When the user enters all of the necessary data to create a new ID on that page and saves the transaction record, Search/Match begins automatically. The system uses the predefined search parameter and the data entered by the user as search criteria. If Search/Match does not find matching IDs, the system saves the transaction successfully. If Search/Match finds at least one matching ID, the system either displays the search results inside a grid on the Search Results page or displays a warning message telling the user that at least one matching ID was found, depending on the setup.

If the component name is associated with a search parameter code only, Search/Match displays a warning message indicating that at least one matching ID was found and on which search order the matching IDs were found. The user is then instructed to either click OK to continue saving the new ID or to click Cancel to avoid saving the transaction and investigate further. In this case, the user can choose to navigate manually to the Search/Match page, enter the search data, and perform the search.

If the component name is associated with a search parameter code and a search result code, Search/Match displays the search results inside a grid on the Search Results page. This enables users to review the potential duplicate IDs without having to manually navigate to the Search/Match page. After reviewing the results on the Search Results page, the user clicks Return and is instructed to either click OK to continue saving the new ID or to click Cancel to avoid saving the transaction and investigate further.

Note. For PeopleSoft Campus Solutions, this setup is valid only when creating person IDs or organization IDs from the following components: SCC_BIO_DEMO, ADM_PROSPECT_PROG, ADM_APPL_ENTRY1, QUICK_ADMIT or ORGANIZATIONS.

For PeopleSoft HRMS, this setup is valid only when creating person IDs from HRS_PREP_FOR_HIRE component.

Warning! To display the Search Results page at save time, you must have a security role with access to the component interface HCR_SM_SEARCH.

See *PeopleTools: Security Administration*

Note. For HRMS, this setup is valid only when creating person IDs from the Personal Data (PERSONAL_DATA) component for commercial HRMS and the Employee Hire (EE_HIRE) component for Federal HRMS.

Understanding Automatic Search Conditions

Search/Match uses phone and email values to perform the search only when a phone or email value is marked as preferred. Therefore, to use PhoneRule and EmailAddressRule inside a search rule triggered automatically when you save a new ID, the ID must have a preferred phone number and preferred email address.

For PeopleSoft Campus Solutions, Search/Match uses the address type fields that the user enters when AddressTypeRule is not included inside a search rule triggered when saving a new person ID but Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule are included. Even if AddressTypeRule is included in a search rule, if you enter more than one address type when creating a new ID, Search/Match reviews the home address type value specified on the Installation - Campus Community page to know which address fields to use to perform the search. If a home address value is not specified on the Installation - Campus Community page, Search/Match uses the first address type that you enter.

Note. HRMS has different Address1Rule, Address2Rule, Address3Rule, Address4Rule, CityRule, CountryRule, CountyRule, PostalRule or StateRule conditions when you save a new person ID.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Working with Search Match"

Setting Up Search/Match

To set up Search/Match use the Search Match Rules (HCR_SM_RULE), Search/Match Parameters (HCR_SM_PARM), Search/Match Result Fields (HCR_SM_RSLT_FLDS), Search/Match Results (HCR_SM_RESULT), and Search/Match (HCR_SM_SEARCH) components.

This section discusses how to:

- Define search rule codes.
- Define search parameters.
- Define search permissions.
- View or add Search/Match result fields.
- Configure Search/Match results.
- Enter search results details.
- Define search results exceptions.
- Configure search result permissions.

Pages Used to Set Up Search/Match

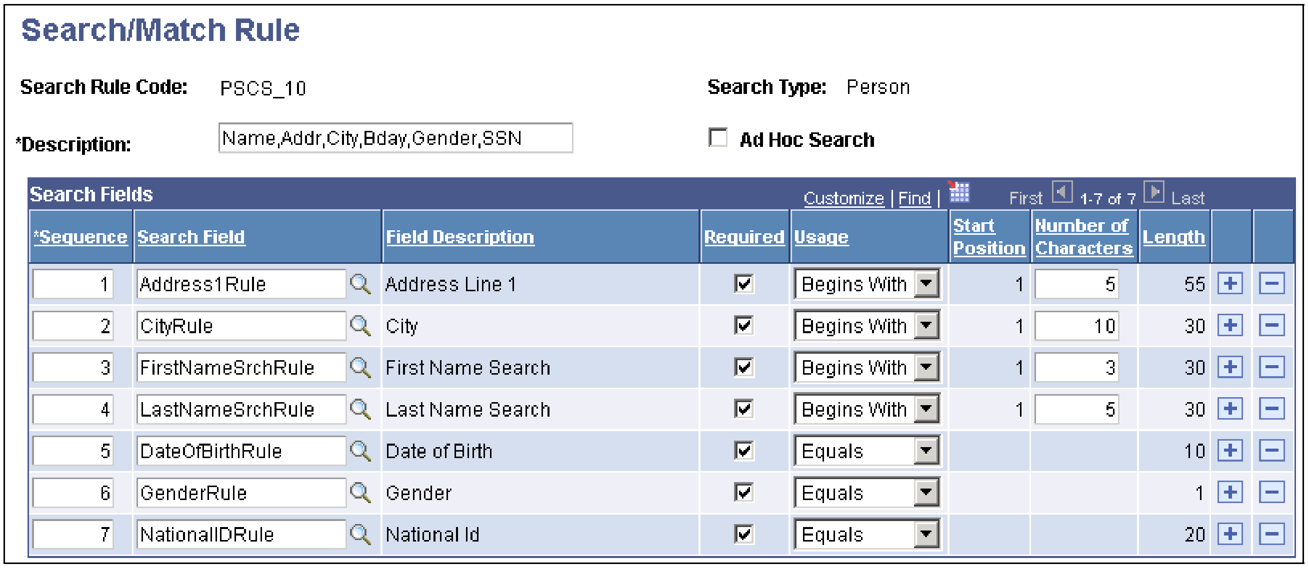
Page Name	*Definition Name*	*Navigation*	*Usage*
Search/Match Rule	HCR_SM_RULE	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules	Define sets of fields to search for and identify how to search for them.

Page Name	***Definition Name***	***Navigation***	***Usage***
Search Parameters	HCR_SM_PARM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters	Combine and order search rules. The combination (called the search parameter) is what the users select prior to performing a search to determine the search fields that they are permitted to search on.
Search Permissions	HCR_SM_PERM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions	Identify who can use the search parameter to perform the search. Also identify which component names, if any, should use the search parameter as part of saving a new ID in the database.
Search/Match Result Fields	HCR_SM_RSLT_FLDS	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Result Fields	View or add fields that are available to define the search results.
Search Results	HCR_SM_RESULT	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Results, Search Results	Specify which result fields to include in the search results and control how to display their values. **Note.** Be careful not to confuse this page with the page also called *Search Results* with a similar object name (HCR_SM_RESULTS), which is the page on which Search/Match displays returns from a search.
Search Results Detail	HCR_SM_RDTL_PG	Click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option.	Define the page to use to view more information about a specific ID returned by Search/Match.
Search Results Exceptions	HCR_SM_RESULT_EXCP	Click the Exceptions link on the Search Results page.	Define field-level security exceptions to the data display control that is set on the Search Results Permissions page

Page Name	Definition Name	Navigation	Usage
Search Result Permissions	HCR_SM_RSLT_PERM	Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions	Identify who should have access to this search result code. Also identify which component, if any, Search/Match should use this result code when a new ID is added and a potential duplicate ID is found.

Defining Search Rule Codes

Access the Search/Match Rule page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Rules).



Search/Match Rule page

Ad Hoc Search

Select to permit custom ad hoc searches from this search rule.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a custom search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Search Fields

Search fields are delivered with your system.

Warning! Adding new search fields require significant programming effort and is not recommended.

Sequence

Enter the order in which you want the search fields to appear when used inside a search parameter.

Search Field and **Field Description**

Select each search field that you want to assign to this search rule code. When you exit the field, the system displays the associated description. Search fields are the fields on which users are permitted to search.

Search fields are delivered with your system. Adding or modifying a search field value requires a significant programming effort. Do not attempt to delete a search field.

Note. When you include name, national ID, phone, email, or address fields in the rule without the types (Name Type, National ID Type, phone type, email type or address type), the system searches on all national IDs, phones, emails or addresses in the system for that individual.

Required

Select this check box to require a value in the search field to find a potential match on this search rule. Selecting this check box is useful for making the rule more restrictive.

If the check box is not selected, the system accepts blank or nonexistent for this field inside this search rule. For example, if all the fields inside a search rule are marked as required, the user must provide data for each of those search fields to find a match on this rule. However, if the Required check box is not selected, for example, for Date of Birth, the user can still search on that search rule without specifying a date of birth.

Usage

Identify how you want the search to evaluate the field value:

Begins With: The value must begin with this data. When you select this value, the Start Position field appears with a default value of *1,* and the Number of Characters fields are available for you to define. You cannot modify the start position default value.

Contains: The value must contain this data but can be preceded or followed by other data. When you select this value, the Start Position field appears with a default value of *1,* and the Number of Characters fields are available for to you define.

Equals: The value must be exactly equal to this data.

Not Used: Do not use this field value in this search.

Start Position and **Number of Characters**

Enter the character position where you want the compare to start, and enter the number of characters from that start position to include in the compare.

For example, if the usage selected for National ID is *Contains,* and you enter a start position of 3 and the number or characters of 5, the system compares against the 3rd, 4th, 5th, 6th, and 7th characters in the field value. It will return matching IDs for which the National ID contains these 5 characters.

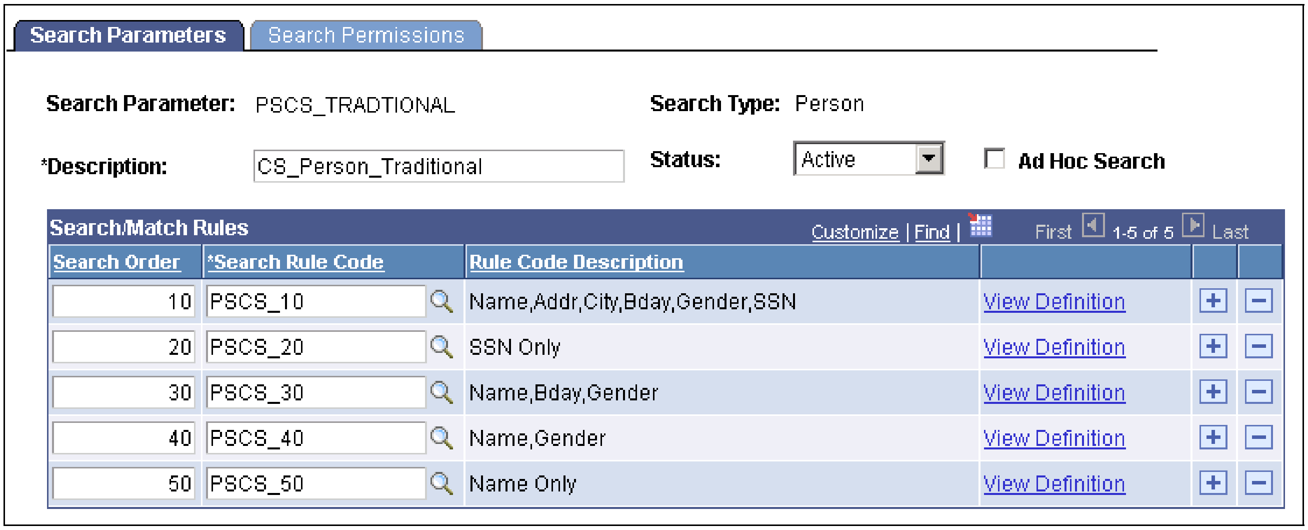
If the usage selected was *Begins With,* the start position is a default value of *1.* You need to specify how many characters from the first character that Search/Match should use to perform the search.

Length

Indicates the number of characters in the search field. When you exit a particular field in the Search Field column, the system displays the total number of characters in the associated field.

Defining Search Parameters

Access the Search Parameters page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Parameters).



Search Parameters page

Ad Hoc Search

Select to permit only custom ad hoc searches from this search parameter.

An ad hoc search enables users to bypass the institution's predefined search standards to perform a custom search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John;* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

Note. Automatic search cannot be performed from a search parameter set to permit ad hoc searches.

Search/Match Rules

Search Order

Enter the order in which to apply the search rule codes of this search parameter. Enter the most restrictive search rule in the lowest order number and the least restrictive search rule in the highest order number.

You can reorder the search rules at any time. When you reorder the rules and save the page, the system displays the rules in the most recent numerical order that you entered.

Search/Match processes the lowest order search rule first; if it finds one or more possible matches, it stops the search and returns the results. If it finds no results, it continues to the next search rule, and so on.

In the search results, the system displays the search order number that corresponds to the search rule where potential matching IDs are found.

You can use only one search rule for an ad hoc search; therefore Search Order fields do not appear when theAd Hoc Search check box is selected.

Search Rule Code and **Rule Code Description**

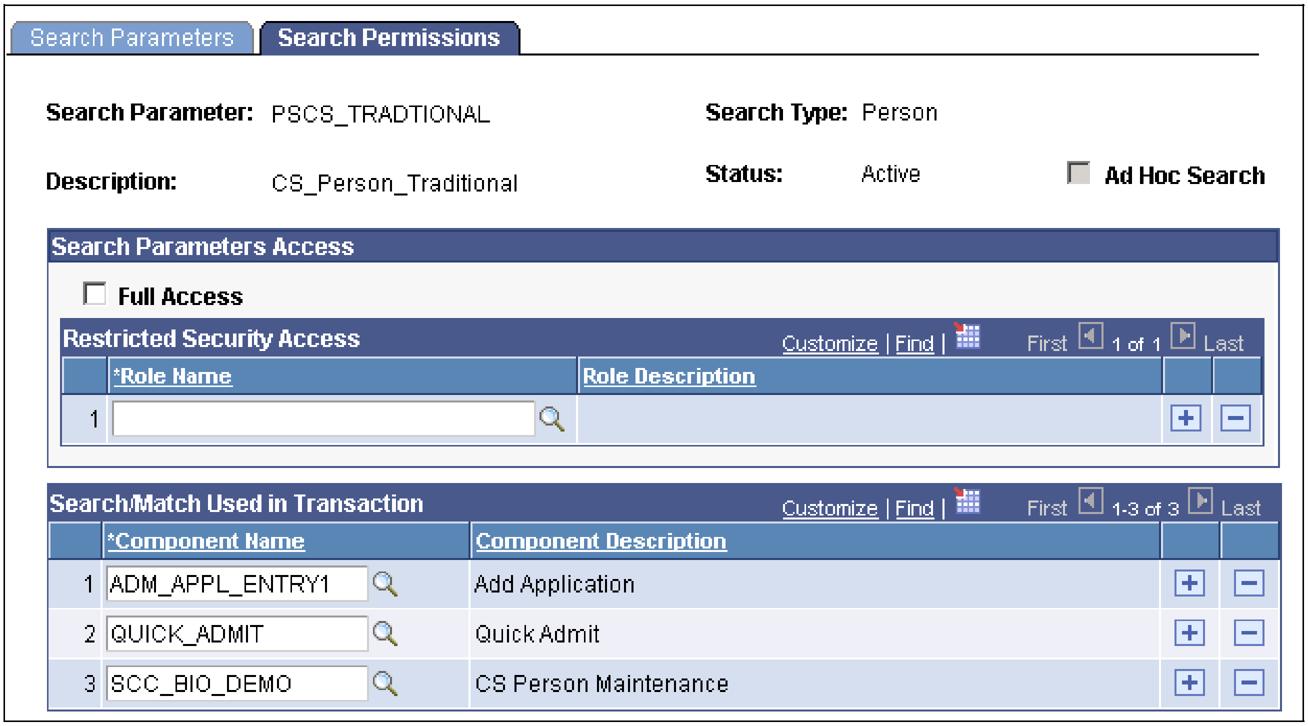
Enter the search rule code to use. When you exit the field, the system displays the search rule description. You must enter at least one search rule to create a valid search parameter.

View Definition

Click this link to access the Search/Match Rule page on which you can view or edit the rule definition.

Defining Search Permissions

Access the Search Permissions page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Parameters, Search Permissions).



Search Permissions page

Search Parameters Access

Full Access

Select to enable all users to use the search parameter code.

Restricted Security Access

This area appears only when the Full Access check box is not selected.

Role Name and **Role Description**

Restrict the use of this search parameter code to users that have specific roles inside their security profile.

Search/Match Used in Transaction

Component Name and **Component Description**

If you want to enforce the use of Search/Match when adding a new ID, select the component name where adding a new ID occurs. The system will then initiate Search/Match when a user enters the data to create a new ID and saves the transaction. You can restrict the search to specific components whether you give permissions to all roles or only to specific roles.

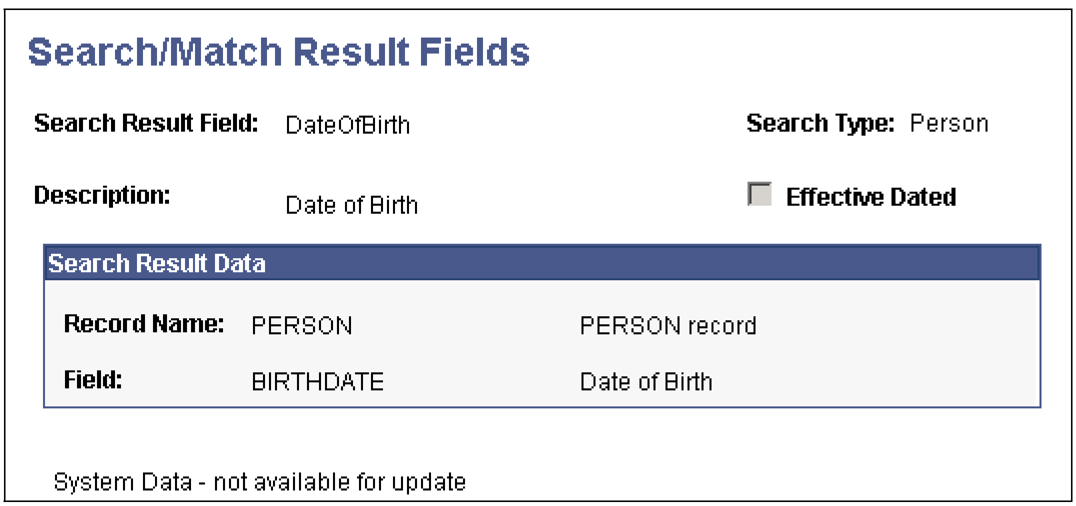
Note. A component name can be associated with only one search parameter. However, the same search parameter can be used inside several component names. Select all components where the search parameter should be used.

If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a warning message indicating that one or more matching IDs was found at search order number XX.

Note. This field is available only when the Search Type is *Person* or *Organization.*

Viewing or Adding Search/Match Result Fields

Access the Search/Match Result Fields page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Result Fields).



Search/Match Result Fields page

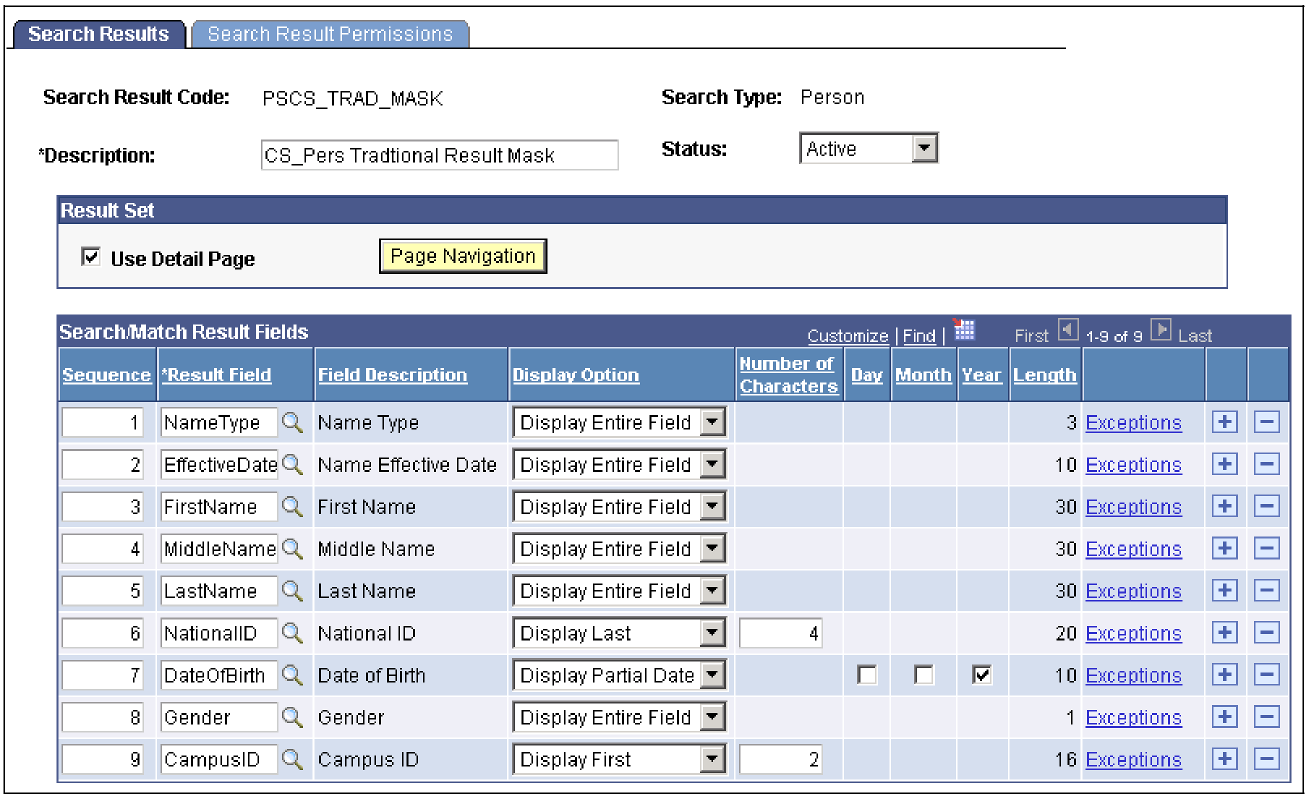
Many Search/Match result fields are delivered predefined and are available for you to use when defining search result codes. The text *System Data - not available for update* appears for these fields on the Search/Match Result Fields page. You cannot edit the data for the predefined search fields. You can, however, select additional fields to make available for your search result codes.

When you select *Add a New Value* and enter a name for the results field, the Search/Match Result Fields page appears with enterable fields for you to select the record and field to make available within the search results. To control how the values for a field appear in the results, use the Search/Match Results setup page.

Note. When search result fields are created based on records that are either effective-dated or type-related (such as address type, email type, phone type, and so on), Search/Match returns a row for each of the dates (history, current, and future dates) and types. For example, the field Gender is included in the PERS_DATA_EFFDT record. If you use Gender as a search result field, then a person with multiple rows on PERS_DATA_EFFDT will display multiple rows with the same gender in the search results grid. This is to make sure the evaluation of potential duplicate IDs occurs across all dates and types applicable to each ID. If your institution prefers to see a limited number of rows, you can create the search result fields based on a view that includes logic to limit the effective date to display only current information or logic to return only a specific type (for example select address information where Address Types is Home).

Configuring Search/Match Results

Access the Search Results page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Results, Search Results).


Search Results | Search Result Permissions

Search Result Code: PSCS_TRAD_MASK   Search Type: Person

*Description: CS_Pers Tradtional Result Mask   Status: Active

Result Set

Use Detail Page   Page Navigation

Search/Match Result Fields   Customize | Find | First 1-9 of 9 Last

Sequence	*Result Field	Field Description	Display Option	Number of Characters	Day	Month	Year	Length			
1	NameType	Name Type	Display Entire Field					3	Exceptions	+	−
2	EffectiveDate	Name Effective Date	Display Entire Field					10	Exceptions	+	−
3	FirstName	First Name	Display Entire Field					30	Exceptions	+	−
4	MiddleName	Middle Name	Display Entire Field					30	Exceptions	+	−
5	LastName	Last Name	Display Entire Field					30	Exceptions	+	−
6	NationalID	National ID	Display Last	4				20	Exceptions	+	−
7	DateOfBirth	Date of Birth	Display Partial Date		☐	☐	☑	10	Exceptions	+	−
8	Gender	Gender	Display Entire Field					1	Exceptions	+	−
9	CampusID	Campus ID	Display First	2				16	Exceptions	+	−

Search Results page

Result Set

Use Detail Page

Select this check box to display a Detail link beside each ID returned from a search.

When you select Use Detail Page, the Page Navigation button appears.

Page Navigation

This button appears only when the Use Detail Page check box is selected.

Click to access the Search Results Detail page, on which you can define the page to which you want users to be directed to see more details about a specific ID.

Note. To be transferred to the page that you define here, the user must have security access to the page.

Search/Match Result Fields

Sequence

Enter the order by which the system displays results in the in the Search/Match results grid. You can reorder the result fields at any time. When you reorder the fields and save the page, the system displays the result fields in the most recent numerical sequence that you entered.

Result Field and**Field Description**

Select the data to return with the search results. Fields used to perform the search (search fields) can be different from the fields needed to review the results (result fields).

The result fields are defined in the Search/Match Result Fields page.

Display Option

Displays the default display control for that field. You can override this. Select *Display Entire Field* or *Mask Entire Field* to display or hide the entire field value respectively . The other options are:

Display First: Displays the first specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the beginning of the field value.

Display Last: Displays the last specified number of characters of the field value. When you select this, the Number of Characters field appears. You must enter the number of characters to display from the end of the field value.

Display Partial Date: Displays the specified parts of a date field value. When you select this, the Day, Month, Year check boxes appear. You must select which parts of the date to display. For example if you select *Year*, only the year will appear.

Number of Characters

Enter the number of first or last characters of a field value to display.

Day, Month, Year

Select the parts of the date to display for a date value.

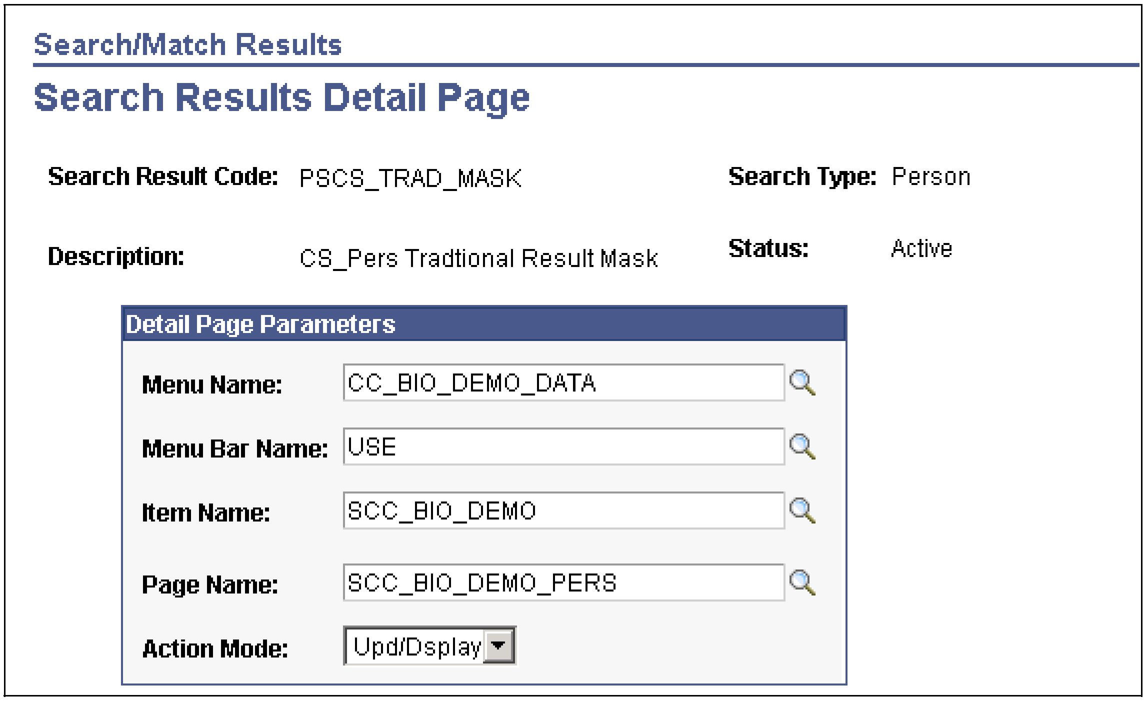
Length

Displays the number of characters possible for the field value.

Exceptions Click this link to access the Exceptions page, on which you can define field-level exceptions to these results.

Entering Search Results Details

Access the Search Results Detail page (click the Page Navigation button that appears on the Search Results page when you select the Use Detail Page option).



Search Results Detail page

Detail Page Parameters

Menu Name, Menu Bar Name, Item Name, and **Page Name** Select each item that corresponds to the page that you want to use to provide more details about a specific ID.

Action Mode Select the action mode to define in which mode you want your users to access the detail page. Options are:

Add

Correction

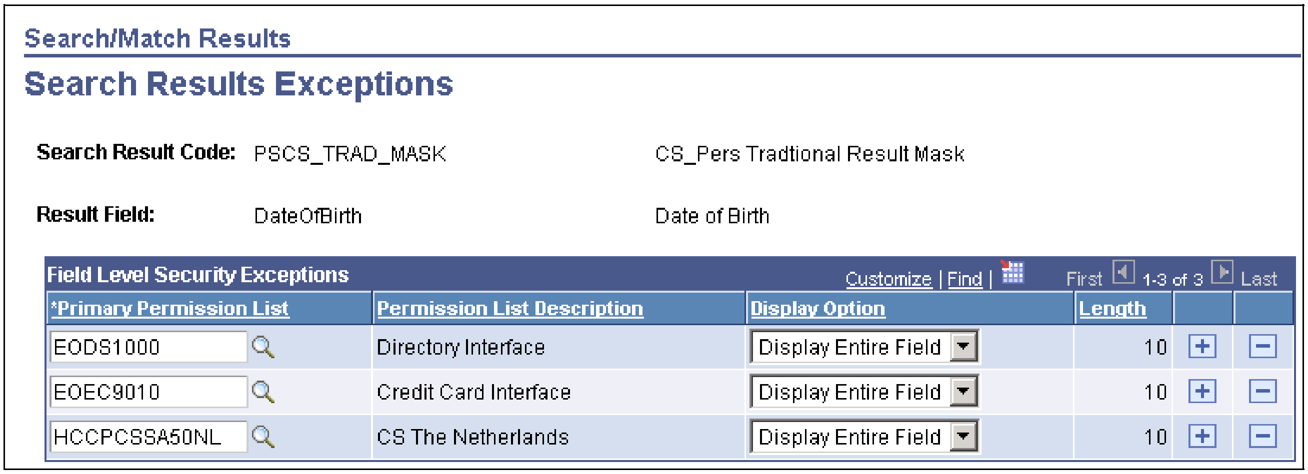
Data Entry

Update/Display

Update

Defining Search Results Exceptions

Access the Search Results Exceptions page (click the Exceptions link on the Search Results page).



Search Results Exceptions page

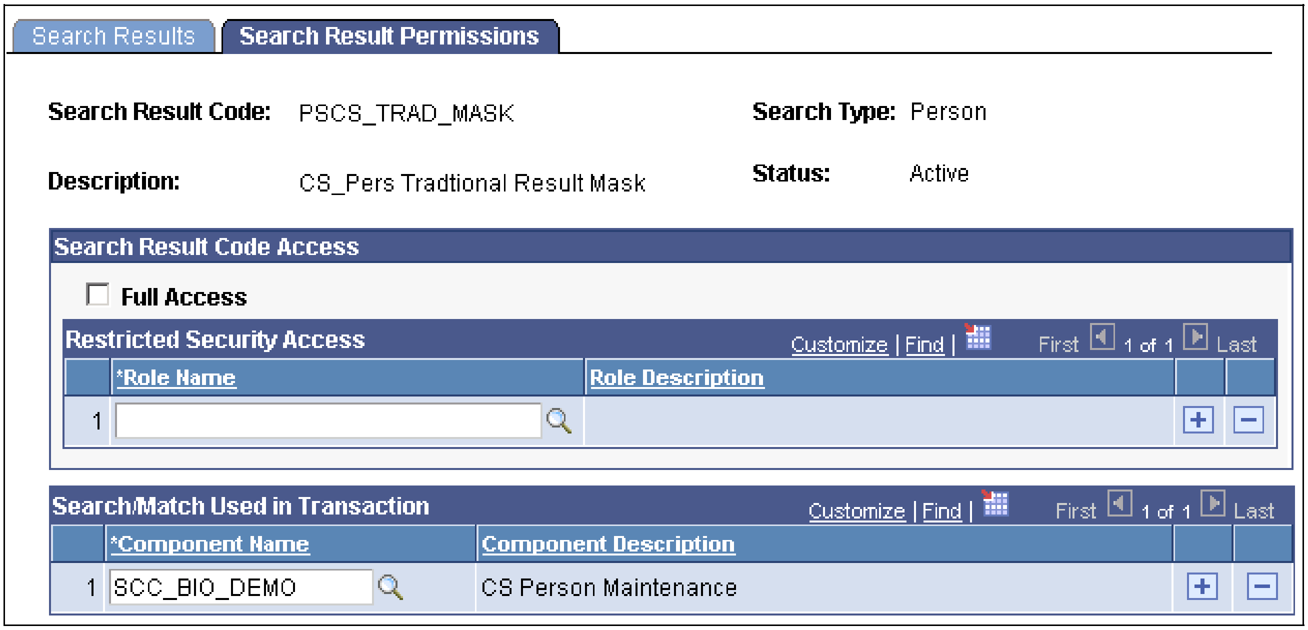
You can define exceptions to the search results that you set up on the Search Results page. For example, you might have partially masked the birth date field in your search results, but you want the entire field to appear for those who have a need to know. Using primary permission lists, you can set those exceptions here.

Field Level Security Exceptions

Primary Permission List and **Permission List Description**	Select the primary permission lists of the users who will be exceptions to the result field selected. When you exit the field, the system displays the permission list description.
Display Option	Select the display option to use as the exception to the display option selected on the Search Rules page.

Configuring Search Result Permissions

Access the Search Result Permissions page (Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Results, Search Result Permissions).



Search Result Permissions

Full Access

Select this check box to enable all users to use the search result code

Role Nameand **Role Description**

Enter roles to restrict the use of this search result code to users that have this role inside their security profile.

Component

This field is available only when the Search Type is *Person.*

If you use automatic search and want to display a warning message to alert users when potential duplicate IDs exist and you want to display the results of the automatic search, select the same component name or names that you selected on the Search Permissions page for the search parameter. You can restrict the search to specific components whether you give permissions to all roles or to only specific roles.

Note. A component name can be associated with only one search result code. However, the same search result code can be used inside several component names. Select all components where the search result code should be used. If Search/Match finds potential matching IDs that correspond to the data entered, the system returns a Search Results page showing the matching IDs that were found.

Chapter 5

Setting Up External Search/Match

This chapter provides an overview of External Search/Match functionality, lists prerequisites, and discusses how to set up External Search/Match.

Understanding External Search/Match

External Search/Match functionality looks and feels much like the standard Search/Match that resides in Campus Solutions (CS). However, External Search/Match integrates with any external system and enables your institution to perform searches within that external system and import records into Campus Community. The goal is to provide complete and meaningful lists of potential duplicate IDs in your entire environment, including IDs that reside outside of the CS database.

External Search/Match executes these searches with the help of two delivered web service operations. You can then use web services to import a matching constituent that does not exist inside the CS database. Web services send outbound search requests from the system of record to an external system and also receive inbound responses coming directly from the external system. As enterprise architectures grow more complex and CS may no longer be the sole source of person data entry and maintenance, searching against external systems ensures that no duplicates exist in your environment.

As with Search/Match, you can perform three types of searches with External Search/Match: applicant, person, and organization. However, the system performs applicant and organizational searches only using Search/Match at this time; you are able to search for only people when using External Search/Match as part of integration with an external system. External Search/Match allows you to search for people simultaneously against the CS database (using the current Search/Match), as well as directly inside an external system; the process displays the combined results inside CS search results pages. If your institution integrates External Search/Match with an external system that allows advanced searching capabilities (for example, External Search/Match is integrated with a data hub that has fuzzy matching capabilities), this extra search logic can be leveraged and the results returned to you contain a richer set of matching candidates.

External Search/Match reuses the same setup parameters and security configuration used for standard Search/Match functionality.

How to Search

You can perform either an online or an automatic search using External Search/Match.

To perform an online search:

1. Access the Search/Match Integrated component.

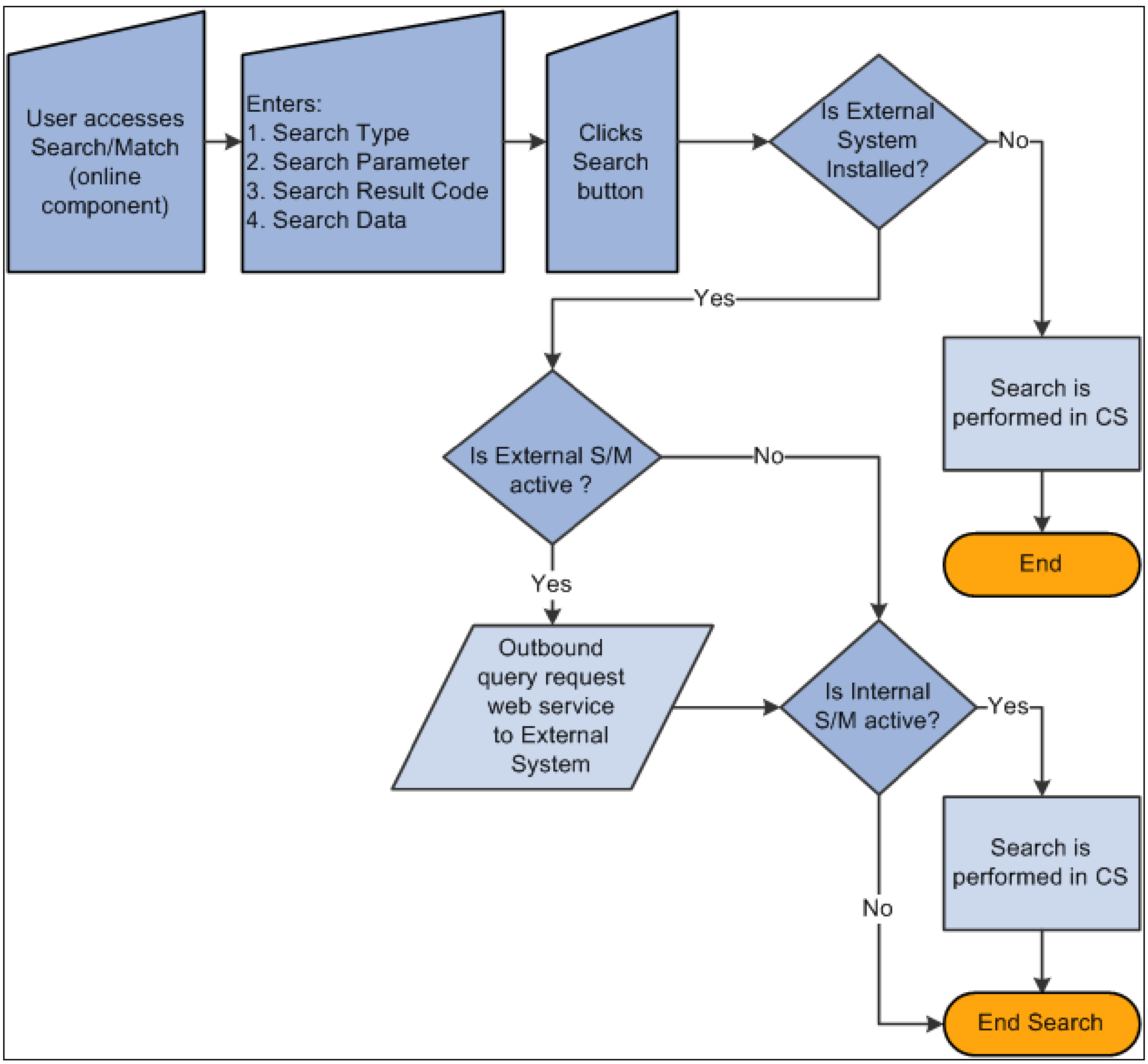
2. Select a *Search Type, Search Parameter, Search Result Code,* and other search fields as appropriate; this step is the same as the existing Search/Match.

3. After populating some or all of these fields with search data, click the Search or Selective Search button.

   The system validates the external system data settings and determines whether the institution is configured for Search/Match, External Search/Match, or both. This determination causes the system to then perform the search inside the CS database and/or outside to an external system.

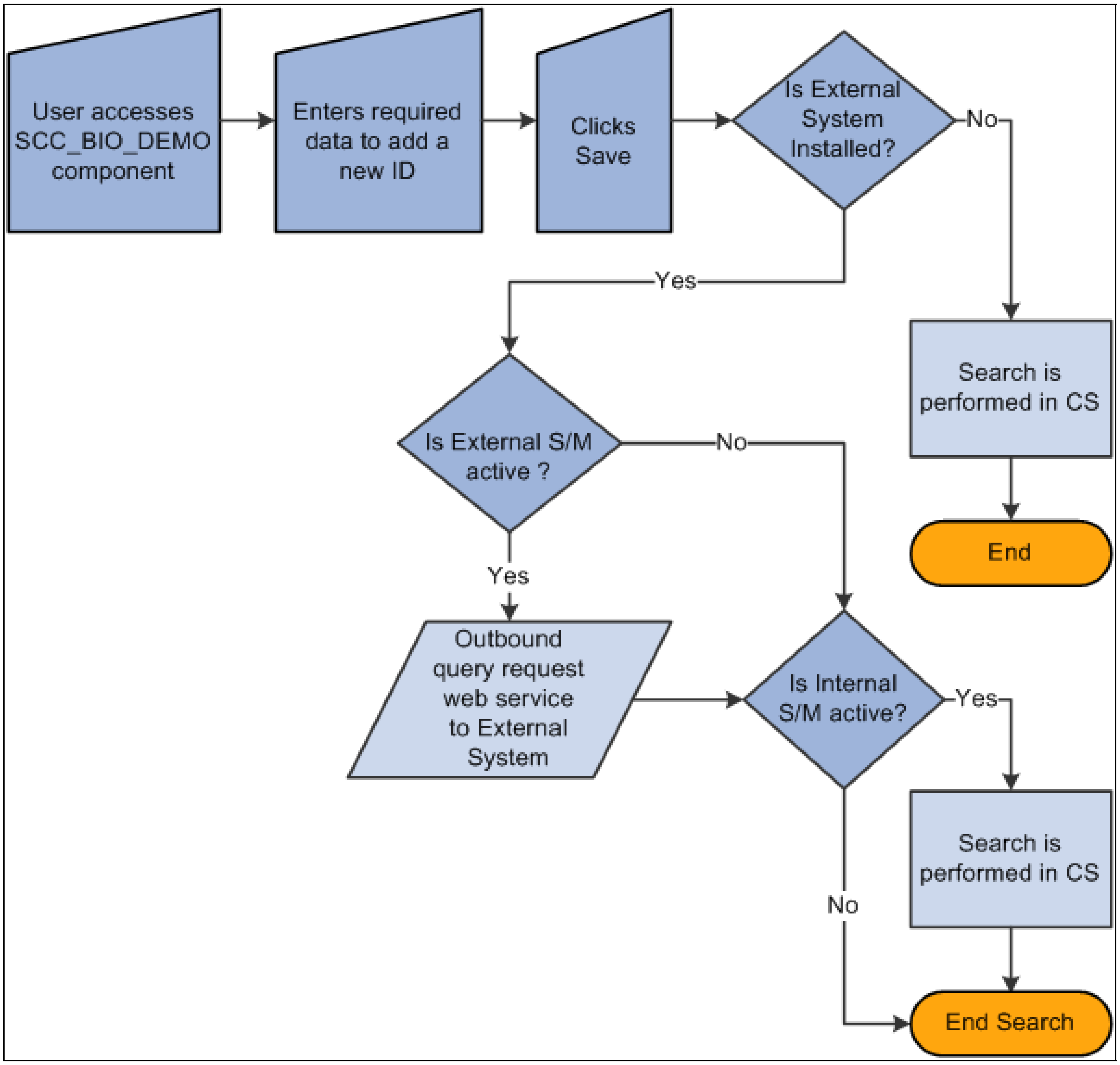
   If the system determines that an external search should occur, then it generates the outbound search request (Match Request). That search request contains all information known about the search. The XML message might contain the search parameters used, the search fields and their values, and so on.

   If your institution integrates with external systems using the Higher Education Constituent Hub (HECH), before the external system can understand the search information contained in the message, search fields must be mapped to fields contained inside the external system. This occurs inside the transformation layer. The external system can then interpret the search data and perform its own search using its search engine, taking advantage of all its search capabilities. If your institution integrates with HCM as an external system, this mapping is not required.



Online search business process

To perform an automatic search, all of the above information applies. When you enter data to create an EmplID on a CS page and then click the Save button, the system invokes additional logic to validate the external data integration settings and then triggers the Match Request.



Automatic search business process

Search Results

After the external system search process completes its search for potential matches, the result data is sent to CS via the response message (Match Response). When you perform a search that triggers both the Internal Search/Match and External Search/Match processes, the system may not find results on the same search order number. The rule for External Search/Match functionality is to display all search results, beginning with the lowest search order number obtained (the most restrictive search rule where matching EmplIDs are found). The search order is determined by the Results Engine.

Before it can display your search results, the Results Engine receives the results from both the Internal Search/Match and External Search/Match processes. The engine evaluates the search order number from each system's matching candidates.

- If Internal Search/Match found matching candidates with a lower search order number than the external system, then the Results Engine displays the results from Internal Search/Match; the lowest search order indicates that it was a more restrictive search.
- If the opposite is true, then the Results Engine displays the results found from the external search.
- If both searches retrieve results on the same search order number, the Results Engine combines the search results into a single display for the user.

Regardless of whether you invoke Internal Search/Match, External Search/Match, or both, the search results appear on the Integrated Search Results page. This page contains many of the same fields as the Search Results page. In addition, the Results tab contains optional columns such as the external system ID (referred to as the Universal ID), the EmplID (when it exists) and the Score% (or the weight) of each matching candidate found if the external system provides that information. The Results tab uses the same masking configuration that is in place for Search/Match.

When External Search/Match finds a matching candidate that does not exist inside the internal system (the matching candidate is not tied to an EmplID), you can still use the Detail link to view more information about the constituent. This case triggers an outbound web service request for more information (Fetch Request). The external system receives the information and returns detailed constituent information inside its response web service (Fetch Response). The system then displays (but does not store) the detailed information inside a Detail page that enables you to review the data.

If you determine that the matching candidate is the person you are looking for, you can import the person record from the Integrated Search Results page. When you click the Import button, the system generates a Fetch Request (the same web service used to retrieve more details about the constituent) and uses the information contained in the Fetch Response to create the new person record inside the CS database. After you generate the person's EmplID, you can then use it to perform subsequent transactions.

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide on My Oracle Support https://support.oracle.com

Implementing External Search/Match between CS and HCM on My Oracle Support

Prerequisites

While your current Search/Match setup can remain unchanged, PeopleSoft recommends that you review it to maximize the search capabilities offered by the external system. For example, if the external system that integrates with External Search/Match does not store National ID information, you could remove this information from your search parameters.

- Search Parameter: Additional Search Parameter codes may need to be created for external system integrations with data hubs to accommodate how the transformation layer evaluates the search parameter used and the various Search Order Numbers.

  Note. External Search/Match includes in the Match Request only the Search Order Numbers for which potential matches can be found (this is the same concept used by Search/Match).

- Search Results: If your results code(s) contain fields that are not stored inside your integrated external system, and if the person returned has an EmplID in the CS system, the Results Engine fetches the data inside the CS database to populate the Results tab.

  For example, a user uses a Search Results code that contains the Aid Year field. If your external system does not store that information, the Results Engine uses the returned EmplID to fetch the CS database and retrieve the information. This is also true for matching candidates returned with an EmplID. If the matching candidate is not stored in the CS database (no EmplID exists), then the Aid Year column remains blank for that candidate.

- Search Results code masking configuration: The system reuses the existing setup when you use a Search Results code with masking configuration and the external system returns results for display.

In addition, you must set up Integration Broker to trigger the following web services:

- SCC_SM_FETCH (Search/Match fetch service).
- SCC_SM_SERVICE (External Search/Match service).

Finally, you must grant users security to the Search/Match Integrated component.

Important! If your institution has specified integration with an external system on the External Core Data Integration page, to ensure that all of your users will search the same way Oracle recommends that you revoke their security to the Search/Match component. All searching capabilities included inside the Search/Match component are included inside the Search/Match Integrated component.

Setting Up External Search/Match Functionality

This section discusses how to:

- Configure external core data integration.
- Configure External Search/Match options.

Note. If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing how to configure and use External Search/Match directly between the two systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

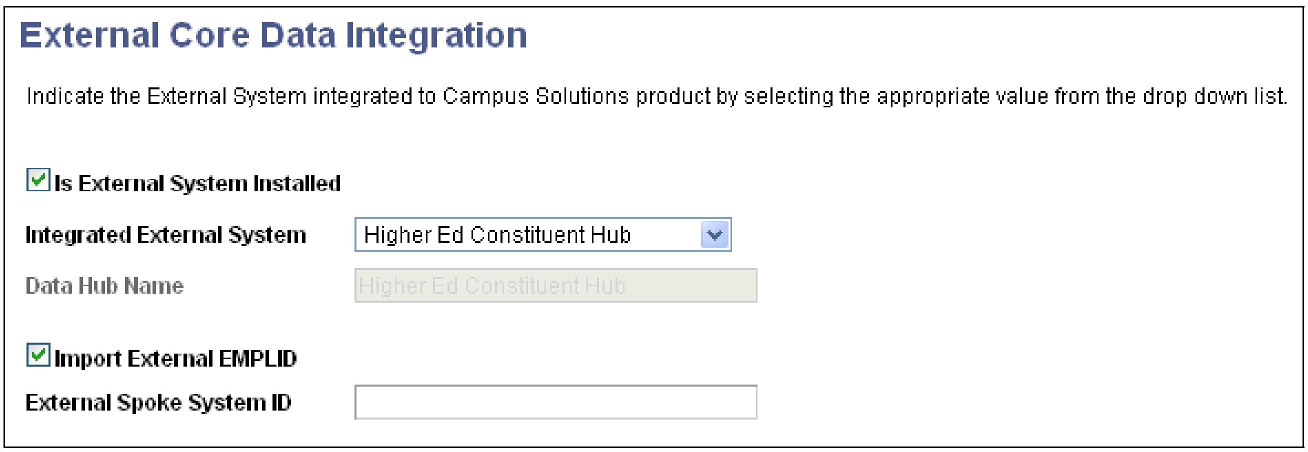
CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Pages Used to Set Up External Search/Match Functionality

Page Name	***Definition Name***	***Navigation***	***Usage***
External Core Data Integration	SCC_EXT_SYSTEM	Set Up SACR, Install, External Core Data Integration	Specify an external system that is integrated with CS for core person data.
External System Search Match Options	SCC_CS_HUB_INSTALL	Set Up SACR, System Administration, Utilities, Search/Match, Search Match with External Sys	Specify External Search/Match options when integrating with an external system.

Configuring External Core Data Integration

Access the External Core Data Integration page (Set Up SACR, Install, External Core Data Install).



External Core Data Integration page

Is External System Installed

Select this check box to indicate whether CS is integrated with any external system. If you do not select this check box, the other fields on the page are unavailable for input.

When users perform a Search/Match, the system evaluates this indicator and determines whether to invoke External Search/Match functionality.

Integrated External System

Select an option to indicate which system is integrated:

HCM installed as third party: Select to indicate that CS and an HCM system are in separate instances and the administrative user has distinguished the HCM system as an External System with direct integration to it (for example, HCM 9.0, HCM 9.1, or another CS system).

Higher Ed Constituent Hub: Select to indicate that the administrative user has integrated with the Oracle Higher Ed Constituent Hub (HECH) data hub.

If *Higher Ed Constituent Hub* is selected, the option to select whether to Import External EMPLID appears, with the External Spoke System ID field to be filled in by the user.

Other external system: Select to indicate that an external system other than an HCM system or HECH data hub has been integrated to CS. This could potentially be another third-party data hub.

[Blank]: Leave the field blank to indicate that CS has no external system integrated with it. This is the default setting for this field.

Data Hub Name

Define the name of the external system, based on the selected Integrated External System. If you selected *HCM installed as third party,* this field changes to *HCM Installed as Third Party* and is unavailable for input. If you selected *Higher Ed Constituent Hub*, this field changes to *Higher Ed Constituent Hub* and is unavailable for input. However, if you selected *Other external system,* this field becomes active; enter the external system name.

Note. PeopleSoft assumes that only one external system will be used.

Import External EMPLID

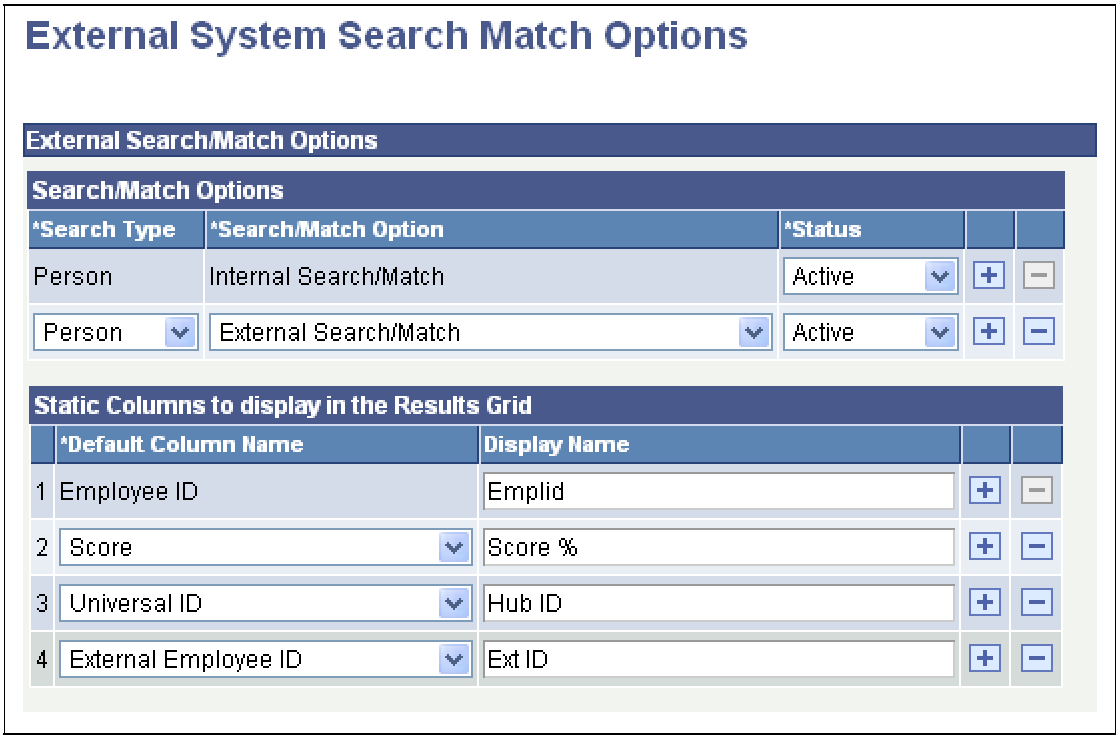
Select this check box to indicate that the institution has elected to make use of an imported HCM EmplID from HECH, rather than to generate a CS-unique EmplID as part of the Fetch service within External Search Match. This check box appears only if the Integrated External System value is *Higher Ed Constituent Hub.*

External Spoke System ID

Specify the unique Spoke ID for the External HCM instance integrated to the HECH. This field appears only if the Import External EMPLID check box is selected, indicating that HCM EmplIDs will be imported. This field is associated with the HCM External System ID within the HECH.

Configuring External Search/Match Options

Access the External System Search Match Options page (Set Up SACR, System Administration, Utilities, Search/Match, Search Match with External Sys).



External System Search Match Options page

If the Is External System Installed check box is not selected on the External Core Data Integration page, the following message appears: "Currently, no External System is configured with Campus Solutions. To configure an External System, navigate to External Core Data Integration page."

Search/Match Options

Fields in this group box determine under what conditions the system will use Search/Match, External Search/Match, or both when adding a new person or saving an updated bio/demo page.

Search Type Select *Person*, *Applicant*, or *Organization.*

Note. At this time, you may only select the *Person* option. The other search types are not yet integrated with External Search/Match.

Search/Match Option

Select which Search/Match functionality to use when an external system is installed:

If you select *Internal Search/Match* and you make it *Active,* then the Search/Match process will search for person IDs inside the CS database.

If you select *External Search/Match* and you make it *Active,* then the External Search/Match process will search for person IDs inside the integrated external system.

If you clear the status or make the status *Inactive,* the system will not trigger a specific Search/Match tool.

Note. Both searches can be selected at the same time, and results appear from both searches on the same Integrated Search Results page.

Static Columns to Displays in the Results Grid

Fields in this group box contain information about additional columns to display inside the Results grid of the Integrated Search Results page.

Default Column Name

Select *EmplID,Universal ID,Score,* or *External Employee ID.*

These are delivered translate values; do not modify them.

EmplID is displayed by default (just like for Search/Match).

Universal ID is a generic term that refers to the external system ID in use. When selected the external system ID is displayed inside the Additional Information tab of the Results grid.

Score is a generic term that refers to your external system method for ranking the matches found. It is the weight or the accuracy of the results found. It is sometimes expressed by a percentage or a number. If your external system does not have ranking capability, do not select this option. When selected, the column appears first in the Results grid.

If you select *Score,* then the system sorts search results in the Results grid by score in descending order and by EmplID in ascending order. If you do not select *Score,* then the search results appear only by EmplID in ascending order.

External Employee ID refers to the External HCM system EmplID. This value is used to display the EmplID of the HCM system that is integrated with the HECH. It is specifically used when the institution has selected to import external EmplIDs rather than generate a CS-unique EmplID.

Display Name

Enter a custom column name for the static columns that appear in the Results grid.

Chapter 6

Setting Up Affiliations

This chapter provides an overview of affiliations setup, lists prerequisites, and discusses how to:

- Define affiliations.
- Define affiliation status.
- Define affiliation rankings.
- Map institution departments to affiliations.

Understanding Affiliations Setup

Affiliations is designed to enable institutions to create and track the roles or relationships that a constituent may have simultaneously with an institution. The configuration of business rules to create and assign these affiliations will vary from institution to institution. Setting up the affiliations feature enables each institution to tailor the specific affiliation code, create a hierarchical structure for the affiliation code, and specify how the affiliation code is managed, either manually or through application-specific transactional events.

Affiliation setup relies on PeopleTools Integration Broker, Constituent Web Services messaging, and an Affiliation Engine. There are two main concepts to consider when implementing affiliations for your institution:

1. Define your requirements.

   The user needs to understand what changes in the Campus Solutions system will trigger an affiliation. These are usually data changes driven by PIA pages or batch programs. In addition, consider what conditions will trigger the assignment and removal of an affiliation.

2. Implementation of the Integration Broker message and triggering code.

   When you create an affiliation, you will write PeopleCode that determines – based on the information in the message contents and possibly data in the database – whether a constituent will be assigned an affiliation or whether the affiliation will be removed.

The *PeopleSoft Campus Solutions Affiliations Developer's Guide* contains detailed information about web services in general and affiliation setup examples.

Steps for setting an affiliation in the system

There are five high-level steps to set an affiliation:

1. A constituent's information is changed in the system.

   This change might result from an applicant applying online, an administrator updating a constituent's information, or from a batch program that updated a constituent's records.

2. As a result of the information changes, an integration broker message is fired.

3. The affiliation framework listens to the Integration Broker message and adapts it to a constituent object so that the Affiliation Engine can understand and process it.

4. The Affiliation Engine evaluates the constituent object and determines whether, based on the institution's rules, an affiliation should be assigned or removed.

5. If an affiliation was assigned or removed, the system sends a constituent message to notify downstream processes that utilize affiliation data.

Affiliations functionality enables your institution to create and manage detailed, complex relationships with the people in your Campus Solutions system; it does not replace existing Relations with Institution functionality in Campus Community or Constituent Types functionality in Contributor Relations.

Prerequisites

Before you can set up or use Affiliations functionality, your institution must enable Constituent Web Services. There are also more technical setup prerequisites, such as defining services and configuring Integration Broker; these steps are covered in the *PeopleSoft Campus Solutions Affiliations Developer's Guide.*

Defining Affiliations

This section discusses how to:

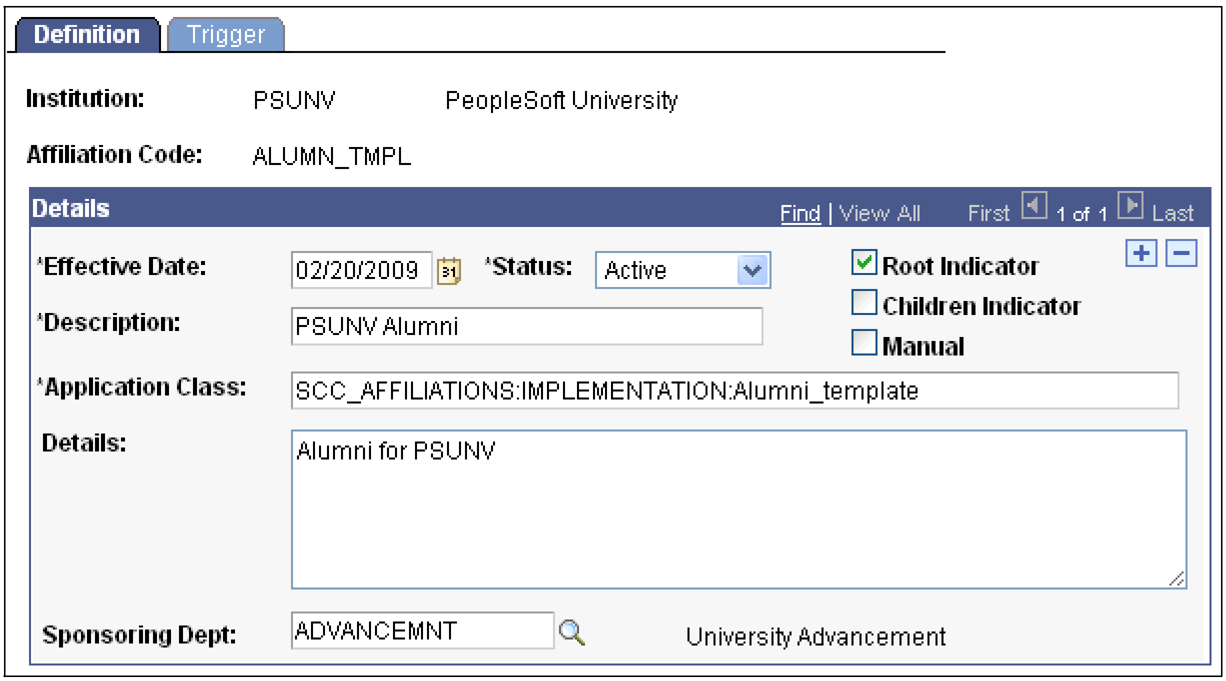
- Create affiliation codes.
- Setting triggers.

Pages Used to Define Affiliations

Page Name	***Definition Name***	***Navigation***	***Usage***
Definition	SCC_AFL_TBL	Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Definition	Define affiliation codes and the hierarchical structure of those codes.
Trigger	SCC_AFL_TRGR	Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Trigger	Define simple events that trigger the system to determine whether to assign or remove an affiliation.

Creating Affiliation Codes

Access the Definition page (Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Definition).



Definition page

The PeopleSoft system delivers two predefined affiliation code examples: *Alumni* and *Recruiter*. The application class and the triggering event information is already set up for these codes. You can not only define the details of an affiliation code but assign it a place in a hierarchy. Hierarchies of affiliation are designated with the Root Indicator and Children Indicator check boxes.

Application Class

Enter the application class assigned for this affiliation code. The Application Class field is available on the last node or leaf of the hierarchy, at the lowest level. The class is created in App Designer and contains the implementation logic or transaction validation logic for the specific affiliation code. The system uses the class defined here to determine which affiliations are set and not set for a person.

The PeopleSoft system delivers two application class templates. Each template file name ends with *"_template"*:

- Alumni
    - Affiliation code: ALUMN_TMPL
    - Application class: SCC_AFFILIATIONS:IMPLEMENTATION:Alumni_template
- Recruiter
    - Affiliation code: RECTR_TMPL
    - Application class: SCC_AFFILIATIONS:IMPLEMENTATION:Recruiter_template

Information on how to define application class logic is contained in the *PeopleSoft Campus Solutions Affiliations Developer's Guide.*

Sponsoring Department

The department that is responsible for creating the affiliation code. Note that this field is informational only.

Note. Root and child affiliations codes can each have their own sponsoring department; child affiliations do not necessarily need to inherit the sponsoring department of the parent affiliation code.

Root Indicator

Select this check box to indicate that the Affiliation Code is at the highest level of the affiliation hierarchy. Clear this check box to indicate that the code is a branch within the hierarchy of the specific Affiliation Code. If there are no children for this code, you must specify the application class here.

Children Indicator

Select this check box to indicate that for the specific Affiliation Code, additional nodes or children exist below this branch in the affiliation hierarchy. When this check box is selected, the Application Class field is no longer available at this level of the hierarchy, and the Child Affiliations group box appears, where you can define and view children of the affiliation.

If no root or child indicator box is selected, the affiliation code is at the lowest level, and you must define implementation logic here (the application class).

Manual — Select this check box to indicate that the affiliation code can be assigned and end dated *only* manually. When you select the check box, the system removes the capability for a user to add an affiliation class and also applies a dummy event for triggering the affiliation as part of its definition. There is no underlying PeopleCode logic that determines whether the affiliation code can be assigned or end dated for triggering events. Because there is no logic associated with the affiliation code, the code cannot be used as part of affiliations batch processing and has no triggering events.

Warning! It is strongly recommended that you do not create affiliation hierarchies such that an affiliation code is dependent on another affiliation code, as it will create sequencing problems during affiliation processing.

Child Affiliations

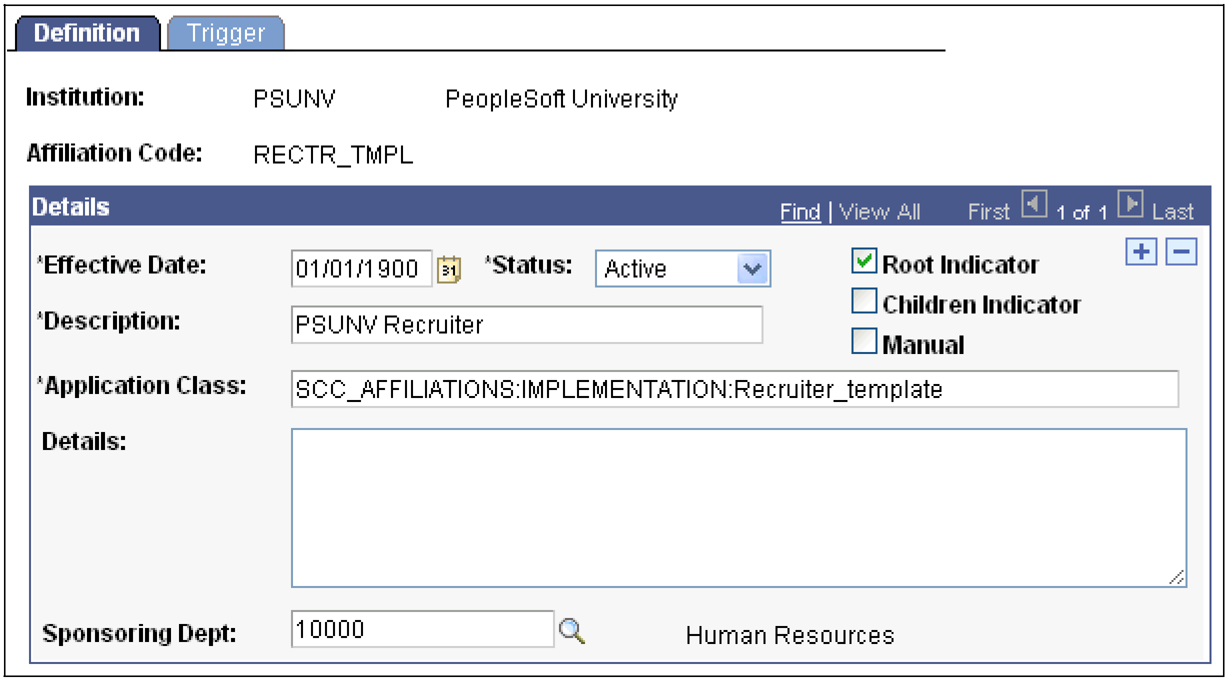
You can enter child affiliations in two ways: click the Add Child Code link to actually create the child affiliation code or select a Child Affiliation Code, if one has already been defined.

Add Child Code — Click this link to create a new individual child affiliation code (on a second Definition page). After you create and save the child affiliation code, the system returns to the original Definition page and the Child Affiliation Code becomes available to be selected and assigned.

Child Affiliation Code — Select an existing code to assign to the child level of the affiliation at the institution.

Single-Level Hierarchy Example

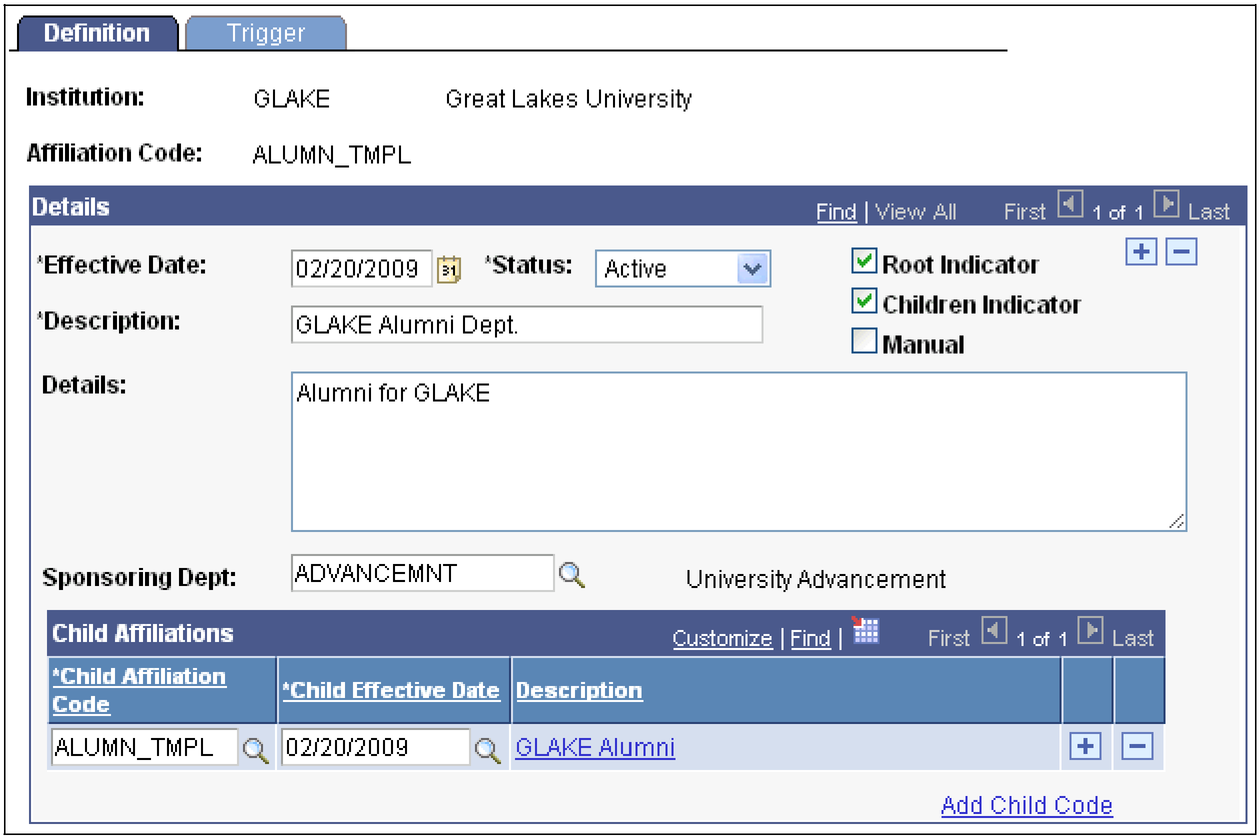
In this example, the Root Indicator check box is selected and the Children Indicator check box is clear. This specifies that there are no additional subcategories or children associated with this affiliation code. Since this is the lowest level in the hierarchy, the application class is entered here to define the transactional logic.



Single-level hierarchy

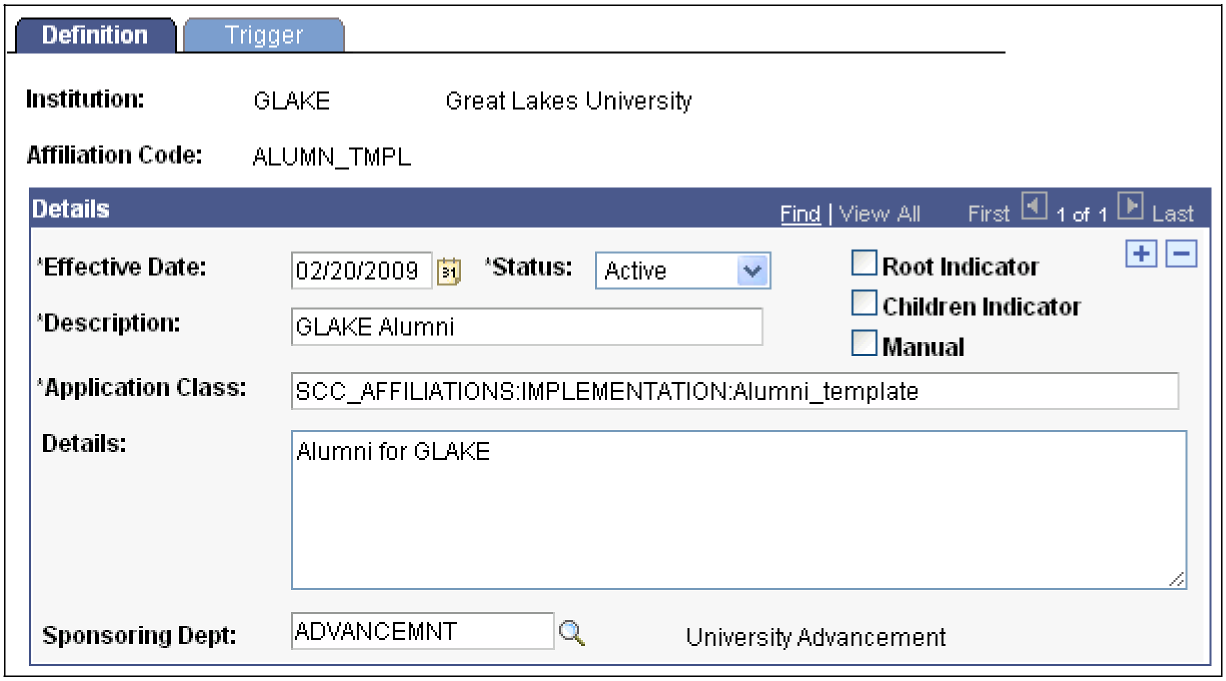
Two-Level Hierarchy Example

In this example, the Root Indicator check box is selected and the Children Indicator check box is selected for the parent/root affiliation. This specifies that the root has additional subcategories or children associated with it. When you select the Children Indicator check box, you can then enter an associated Child Affiliation Code that has already been defined.



Two-level hierarchy (1 of 2)

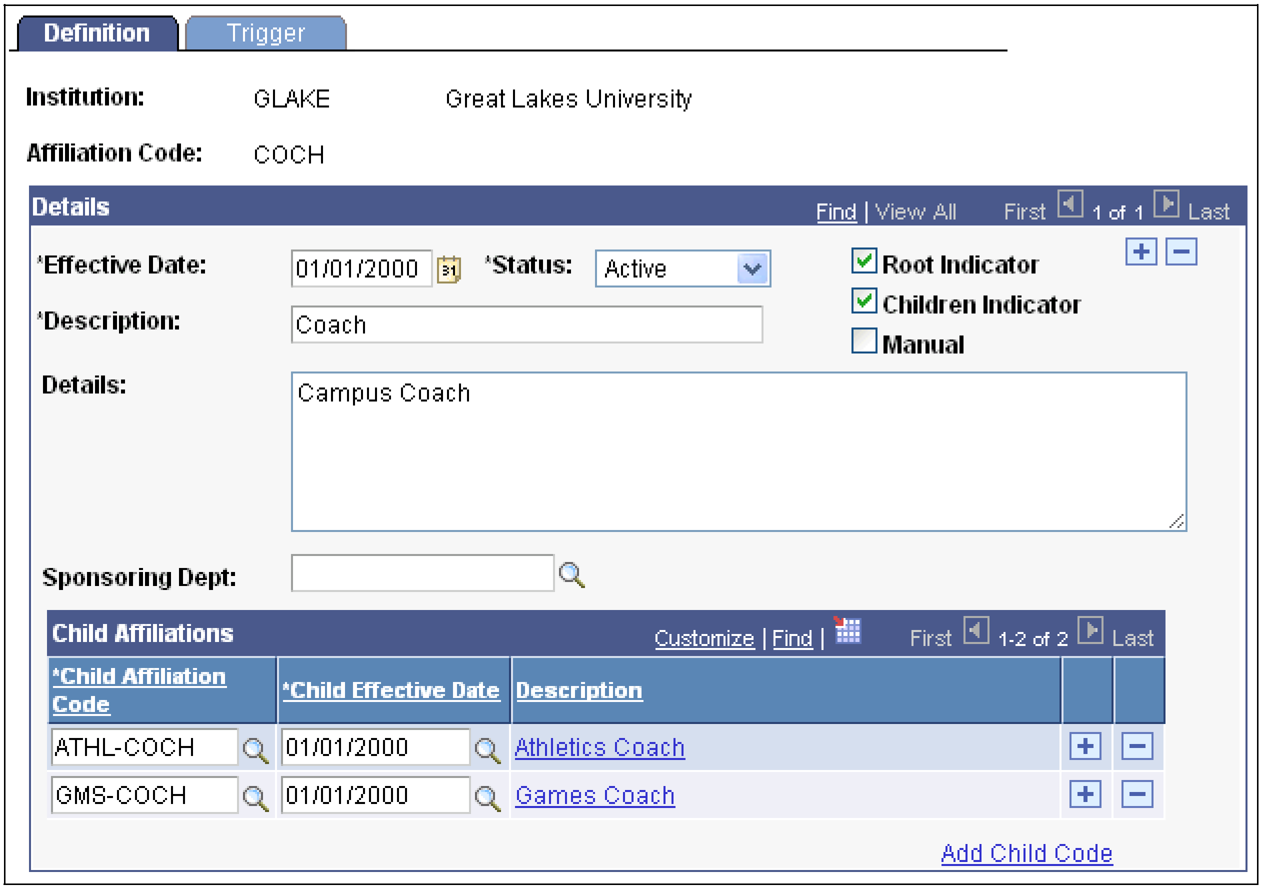
The lowest level of a hierarchical affiliation does not have the check boxes for either Root Indicator or Children Indicator selected. In a two-level hierarchy, the child of the affiliation has no indicator boxes checked and the Application Class field contains the actual affiliation application class value.



Two-level hierarchy (2 of 2)

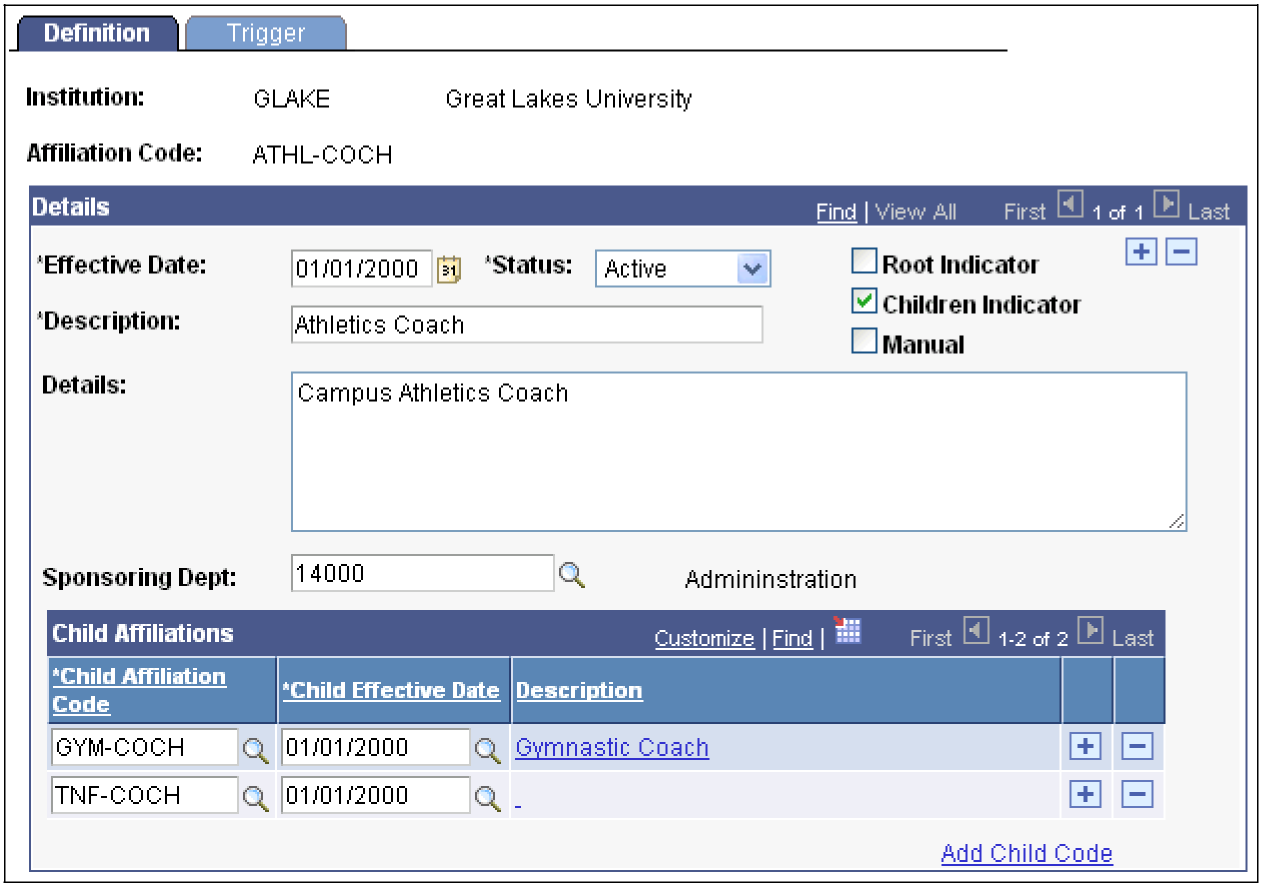
Three-or-More-Level Hierarchy Example

In this example, both the Root Indicator check box and the Children Indicator check box are selected for the parent/root affiliation code. This specifies that the root has additional subcategories or children associated with it. When you select the Children Indicator check box, you can then define or enter an associated Child Affiliation Code that has already been defined.



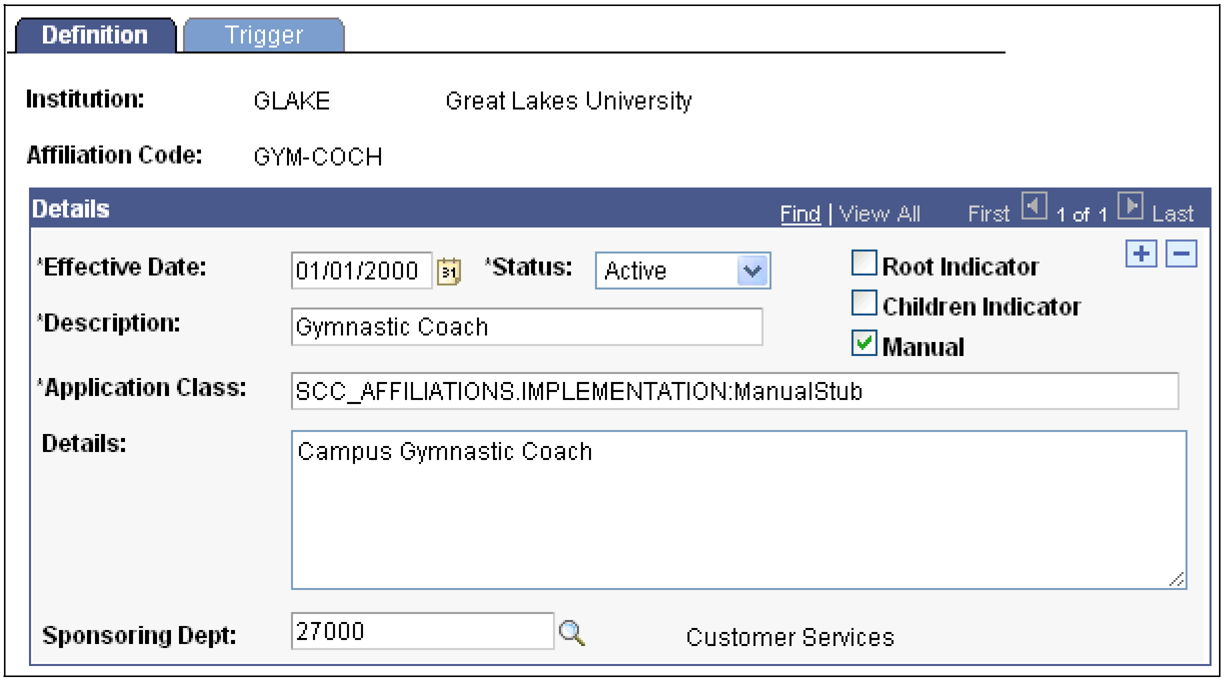
Three-or-more level hierarchy (1 of 3)

For the middle-level affiliation codes, the Root Indicator check box is cleared and the Children Indicator check box is selected. This specifies that the affiliation code is *not* the root and it has additional subcategories associated with it. When you select the Children Indicator check box, you can then enter the associated Children Affiliation Code that has already been defined for this affiliation code.



Three-or-more level hierarchy (2 of 3)

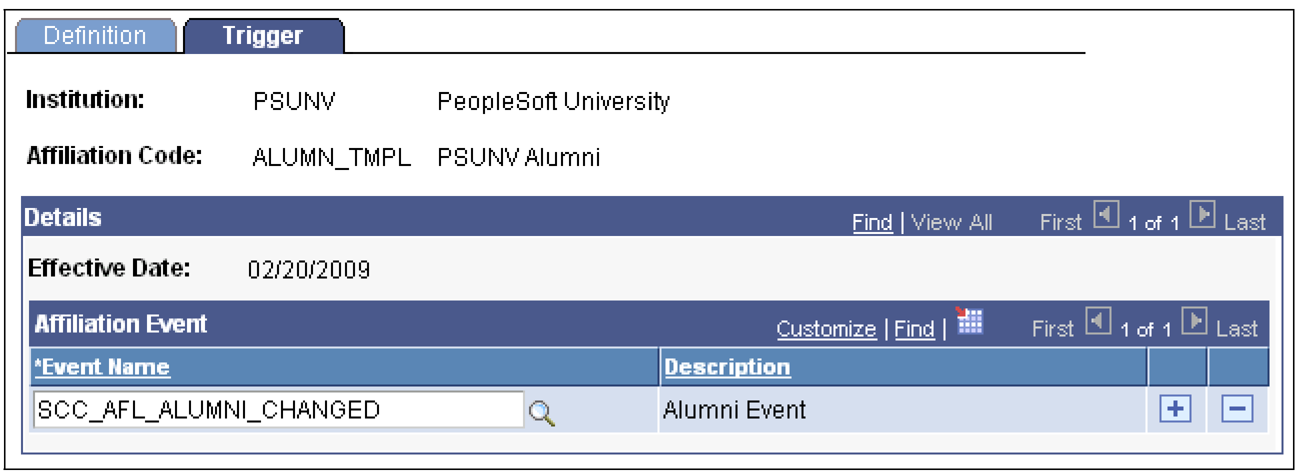
The lowest level of a hierarchical affiliation does not have the boxes for Root Indicator or Children Indicator selected. These are left clear and the Application Class contains the actual affiliation application class value.



Three-or-more level hierarchy (3 of 3)

Setting Triggers

Access the Trigger page (Set Up SACR, Common Definitions, Affiliations, Affiliation Setup, Trigger).



Trigger page

Add the Event Name, registered through the Constituent Event Registration component, that associates the application class with a constituent management service operation for the affiliation code. There are two delivered triggers that correspond to the system-defined affiliation templates for Alumni and Recruiter. These are:

- Alumni: SCC_AFL_ALUMNI_CHANGED
- Recruiter: SCC_AFL_RECRUITER_CHANGED

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide, posted to My Oracle Support https://support.oracle.com

Defining Affiliation Status

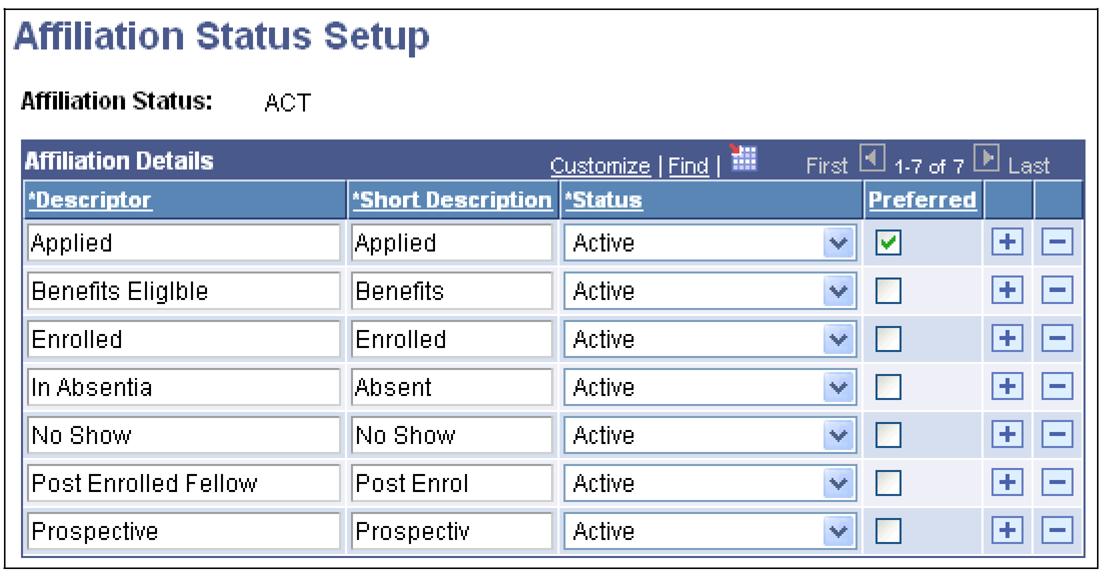
This section discusses how to set up affiliation status details.

Page Used to Define Affiliation Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Affiliation Status Setup	SCC_AFL_STTS_SETUP	Set Up SACR, Common Definitions, Affiliations, Affiliation Status Setup	Define the statuses to be assigned to affiliation codes.

Setting Up Affiliation Status Details

Access the Affiliation Status Setup page (Set Up SACR, Common Definitions, Affiliations, Affiliation Status Setup).



Affiliation Status Setup page

An affiliation status of *Active*,*Inactive*, or *Error* can be set for various reasons. The fields on this page enable you to further clarify a specific status that provides additional meaning to all three affiliation statuses: Active, Inactive, and Error.

You cannot delete an affiliation, but you can make it inactive.

Preferred	Select this check box to indicate that a status' description should be the default value to appear on affiliation pages, when that status is selected.

Defining Affiliation Rankings

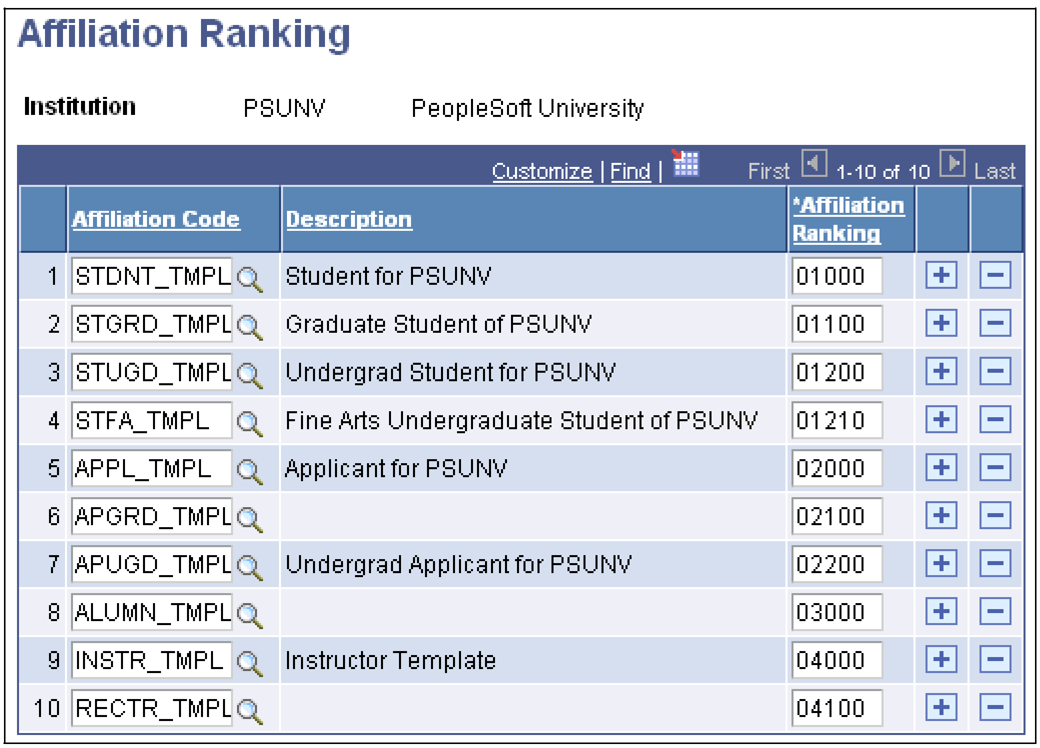
This section discusses how to assign rankings to affiliation codes.

Page Used to Define Affiliation Rankings

Page Name	*Definition Name*	*Navigation*	*Usage*
Affiliation Ranking	SCC_AFL_RANKING	Set Up SACR, Common Definitions, Affiliations, Affiliation Ranking	Manually assign a five-digit ranking to an affiliation code, per institution.

Assigning Rankings to Affiliation Codes

Access the Affiliation Ranking page (Set Up SACR, Common Definitions, Affiliations, Affiliation Ranking).



Affiliation Ranking page

This page enables users to assign a numerical rank to all tiers of an affiliation, both root and children. There is no logic attached to the rankings that you assign.

Note. Multiple affiliation codes can have the same ranking.

Mapping Institution Departments to Affiliations

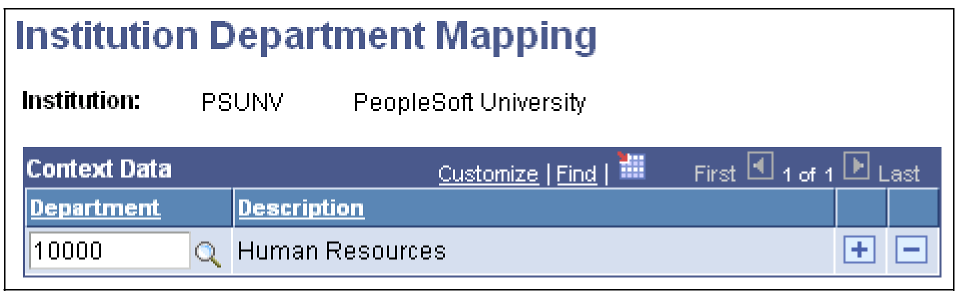
This section discusses how to map departments to institutions.

Page Used to Map Institution Departments to Affiliations

Page Name	***Definition Name***	***Navigation***	***Usage***
Institution Department Mapping	SCC_AFL_INS_DEP	Set Up SACR, Common Definitions, Affiliations, Institution Department Mapping	Map departments with no institution key to an affiliation.

Mapping Departments to Institutions

Access the Institution Department Mapping page (Set Up SACR, Common Definitions, Affiliations, Institution Department Mapping).



Institution Department Mapping page

This page is used for affiliation codes, based on data model structures within Campus Solutions, that are not keyed by institution but rather by department (such as employee). These codes enable the user to map such department to an institution for use within the affiliation framework structure.

Chapter 7

Setting Up Biographical Information

This chapter discusses how to:

- Set up names, addresses, and phone numbers.
- Set up personal attributes.
- Set up FERPA privacy controls.
- Set up individual relationships.
- Set up relations to the institution.
- Set up emergency contacts data.
- (USA) Set up work experience classification codes.

Setting Up Names, Addresses, and Phone Numbers

Setting Up Personal Attributes

To set up personal attributes, use the Ethnicity Table component (ETHNICITY_TBL), Language Table component (LANGUAGE_TABLE), Religious Preference Table component (REL_PRE_TABLE_GBL), and Decedent Data component (SA_DECEASED_DATA).

For NZL, also set up the Ethnicity NZL component (SSR_ETHNICITY_NZL), the Ethnicity Map NZL component (SSR_ETHNIC_MAP_NZL), and the Iwi Table component (SCC_TRIBE_TBL).

This section discusses how to:

- Define ethnic groups.
- (NZL) Set up Statistics New Zealand ethnic group codes.
- (NZL) Map Statistics New Zealand ethnic codes to PeopleSoft ethnic groups.
- (NZL) Set up Single Data Return (SDR) country of citizenship codes.
- (NZL) Map SDR country of citizenship codes to PeopleSoft country codes.
- (NZL) Map SDR residency values to PeopleSoft residency values.

- (NZL) Set up codes for Iwi tribes.
- Define religious preference codes.
- Set up decedent data.

Note. Languages are set up from the HRMS Accomplishments component.

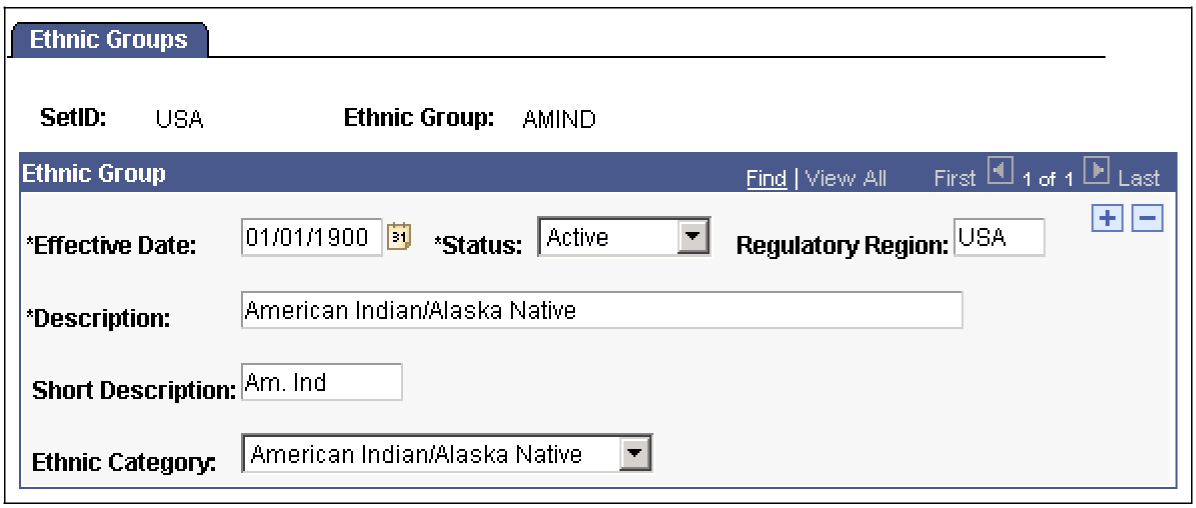
Pages Used to Set Up Personal Attributes

Page Name	*Definition Name*	*Navigation*	*Usage*
Ethnic Groups	ETHNIC_GROUP_TBL	Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups	Define ethnic groups.
Ethnicity NZL	SSR_ETHNICITY_NZL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Ethnicity NZL.	Set up Statistics New Zealand ethnic codes.
Ethnicity Map NZL	SSR_ETHNIC_MAP_NZL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Ethnicity Map NZL.	Map Statistics New Zealand ethnic codes to PeopleSoft ethnic groups.
Citizenship NZL	SSR_CITIZEN_NZL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Citizenship NZL	Set up SDR country of citizenship codes.
Citizenship Map NZL	SSR_CITIZEN_MAP	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Citizenship Map NZL	Map SDR country of citizenship codes to PeopleSoft country codes.
Residency Map NZL	SSR_RESIDENCY_MAP	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Map NZL	Map SDR residency values to PeopleSoft residency values.
Iwi Table	SCC_TRIB_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Iwi Table	Set up codes for Iwi tribes.

Page Name	***Definition Name***	***Navigation***	***Usage***
Religious Preference Table	REL_PREF_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Religious Preference Table	Define religious preference codes.
Language Table	LANGUAGE_TABLE	Set Up HRMS, Product Related, Profile Management, Content Catalog, Content Items, Language Table	Define language codes.

Defining Ethnic Groups

Access the Ethnic Groups page (Set Up HRMS, Product Related, Workforce Administration, Ethnic Groups).



Ethnic Groups page

Ethnic Group

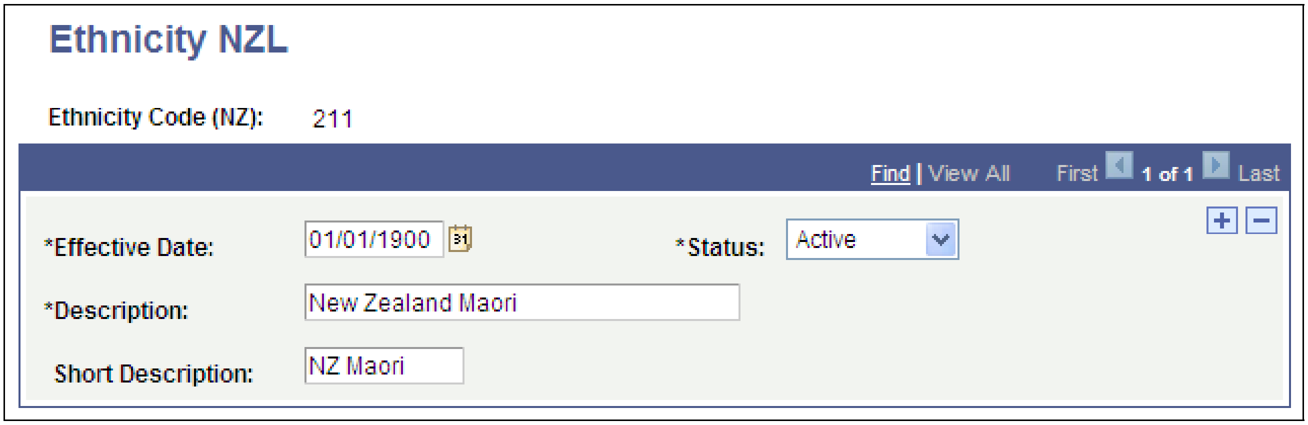
Ethnic Category

Select the category with which you want to associate the ethnic group. You can associate many ethnic groups with the same ethnic category.

PeopleSoft delivers some ethnicity groups predefined and associated with U.S. recognized ethnic group categories. These categories are translate values *(White,Black/African American,Hispanic/Latino, Asian,American Indian/Alaska Native,Native Hawaiian/Other Pacific Islander*, and *Not Specified.)* Do not modify these delivered values. Modifications to these translate values could require substantial programming effort. You can, however, create additional ethnic groups and associate them with existing ethnic categories to reflect the diverse ethnicities that comprise your campus community.

(NZL) Setting Up Statistics New Zealand Ethnic Codes

Access the Ethnicity (NZL) page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Ethnicity NZL).



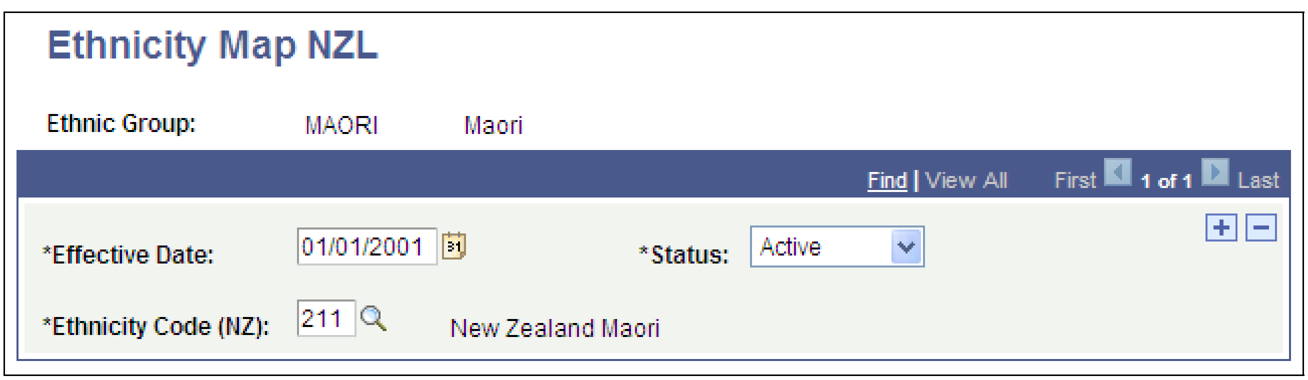
Ethnicity NZL page

PeopleSoft delivers Statistics New Zealand ethnicity codes and descriptions predefined. You can add new codes, but do not modify the delivered codes.

The code that you enter must be three digits in length.

(NZL) Mapping Statistics New Zealand Ethnic Codes to PeopleSoft Ethnic Groups

Access the Ethnicity Map NZL page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Ethnicity Map NZL).



Ethnicity Map NZL page

Ethnicity Code (NZ)

Enter the Statistics New Zealand numeric code for the ethnicity that you want to associate with this PeopleSoft ethnic group.

This three-digit code is used to build the Ethnicity field reported in Single Data Return (SDR). This setup table maps the SSR_ETHNICITY_CODE to the ETHNIC_GRP_CD.

(NZL) Setting Up SDR Country of Citizenship Codes

Access the Citizenship NZL page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Citizenship NZL).

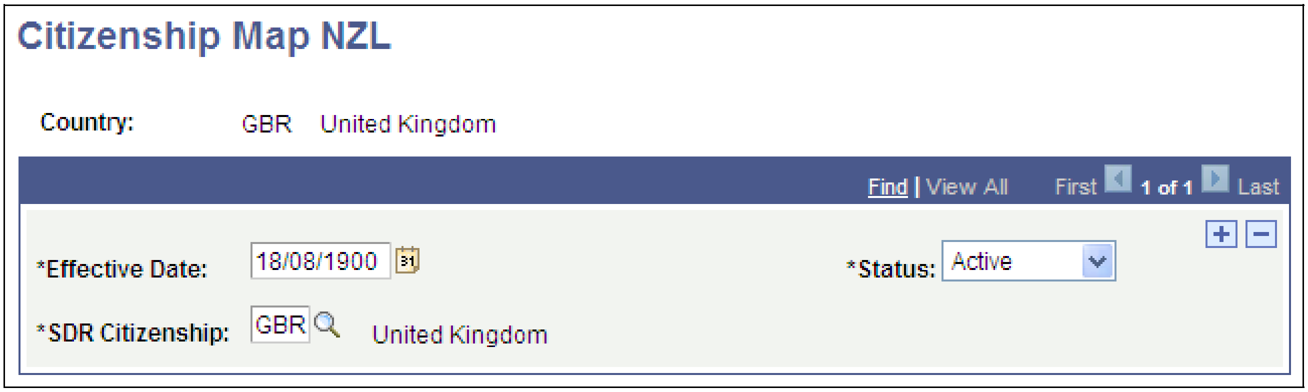
Citizenship NZL page

Status

You can select a status of *Inactive* for codes that are not relevant to your institution—codes that are *Inactive* are not available for selection in the SDR Citizenship field on the Citizenship Map NZL page.

(NZL) Mapping SDR Country of Citizenship Codes to PeopleSoft Country Codes

Access the Citizenship Map NZL page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Citizenship Map NZL).



Citizenship Map NZL page

SDR Citizenship

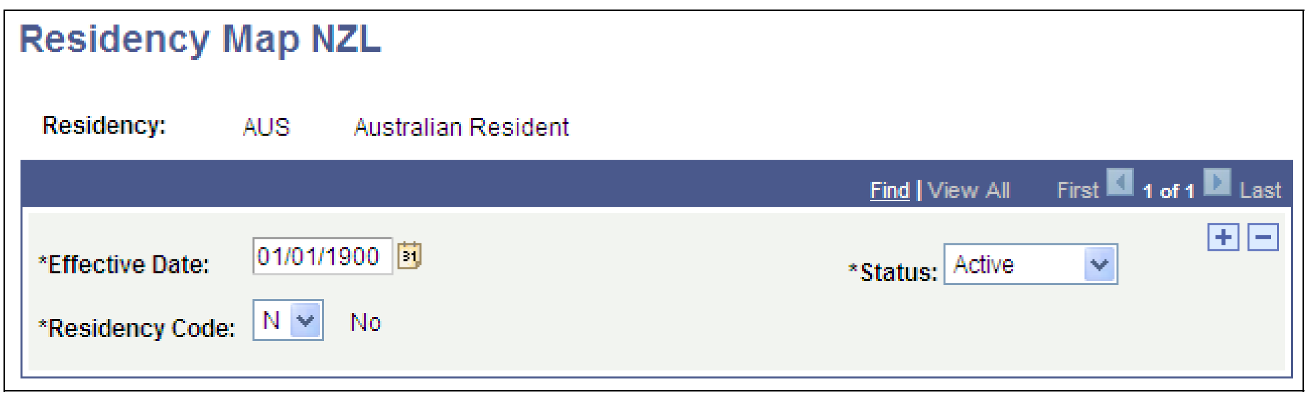
Select the SDR Citizenship value that you want to associate with the PeopleSoft country code.

SDR Citizenship values are defined on the Citizenship NZL page—only values with an *Active* status are available for selection.

This three digit code is used to build the Citizen field reported in the Single Data Return (SDR). This setup table maps SSR_Citizen to Country.

(NZL) Map SDR Residency Values to PeopleSoft Residency Values

Access the Residency Map NZL page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Map NZL).



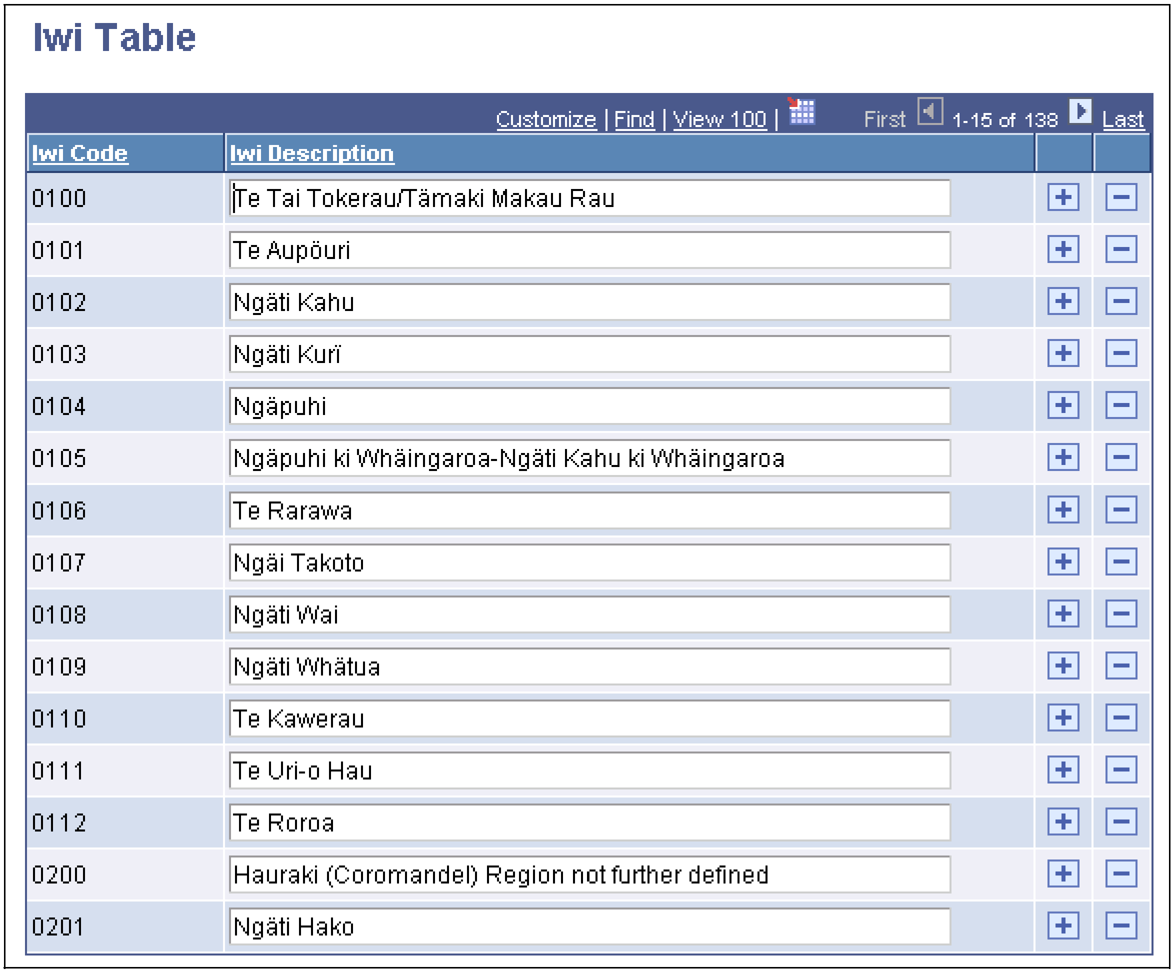
Residency Map NZL page

Use this page to map SDR residency values of *Y* or *N* to PeopleSoft residency values.

Values in the Residency field are based on the values defined on the Residency Table (RESIDENCY_TABLE) page.

(NZL) Setting Up Codes for Iwi Tribes

Access the Iwi Tribes page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Iwi Table).



Iwi Table

Customize | Find | View 100 | First 1-15 of 138 Last

Iwi Code	Iwi Description
0100	Te Tai Tokerau/Tāmaki Makau Rau
0101	Te Aupōuri
0102	Ngāti Kahu
0103	Ngāti Kurī
0104	Ngāpuhi
0105	Ngāpuhi ki Whāingaroa-Ngāti Kahu ki Whāingaroa
0106	Te Rarawa
0107	Ngāi Takoto
0108	Ngāti Wai
0109	Ngāti Whātua
0110	Te Kawerau
0111	Te Uri-o Hau
0112	Te Roroa
0200	Hauraki (Coromandel) Region not further defined
0201	Ngāti Hako

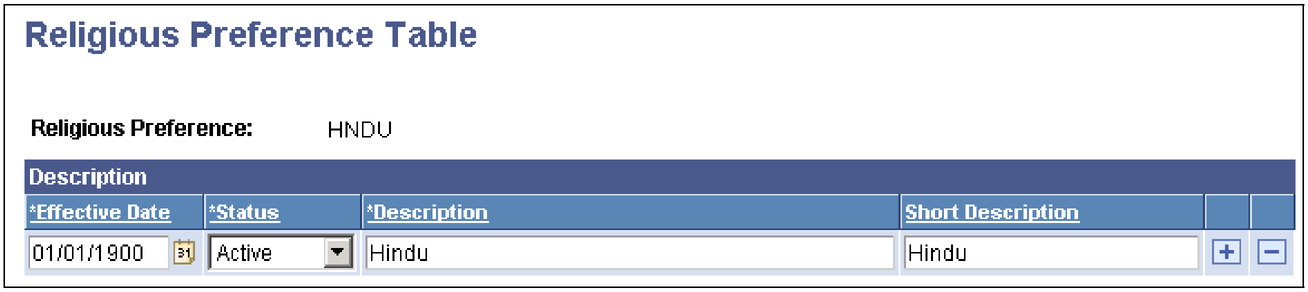
Iwi Table

Iwi codes are used in Single Data Return (SDR) reporting. The PeopleSoft system delivers Iwi codes and their descriptions predefined. The codes are 4 digits each, reported in a 12-character field in SDR. You can specify up to three codes for an individual, for a total of 12 characters.

Ethnic group is mapped to ethnicity code and reported in SDR. IWI is reported as is. There is no mapping from Iwi code to or from ethnic group. Iwi codes are reported from SCC_TRIBE_CODE in record SCC_IWI_TBL

Defining Religious Preference Codes

Access the Religious Preference Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Religious Preference Table).



Religious Preference Table

PeopleSoft delivers some religious preference codes predefined. You can create additional codes for each religious preference that people at your institution might have. When you enter religious preferences for individuals, you can specify more than one.

Setting Up Decedent Data

When an individual dies, enter the date and place of death, and the death certificate number if you have it, on the Decedent Data page. When you enter and save the date of death on that page, the system displays the word *DECEASED* on each page in your database across your institution about that individual.

Note. All of the decedent's data continues to exist unless or until you delete the individual's ID.

Though you hope not to use this feature frequently, consider setting it up so it is available when the need arises.

Setting Up Self-Service Ethnicity Reporting

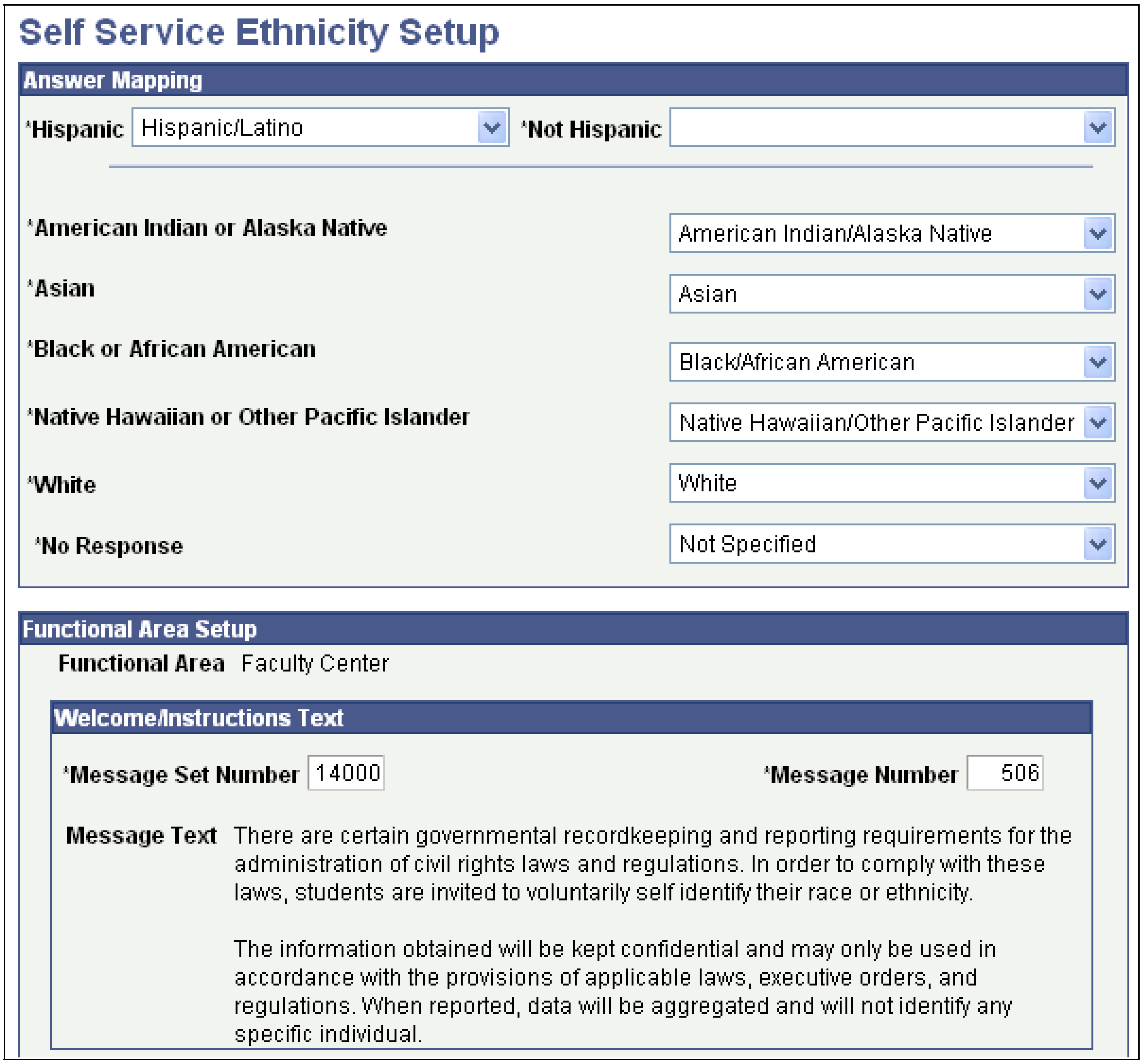
This section discusses how to set up self-service ethnicity options for U.S.-based customers wanting to survey their faculty, staff, and students to collect IPEDS information.

Page Used to Set Up Self-Service Ethnicity Reporting

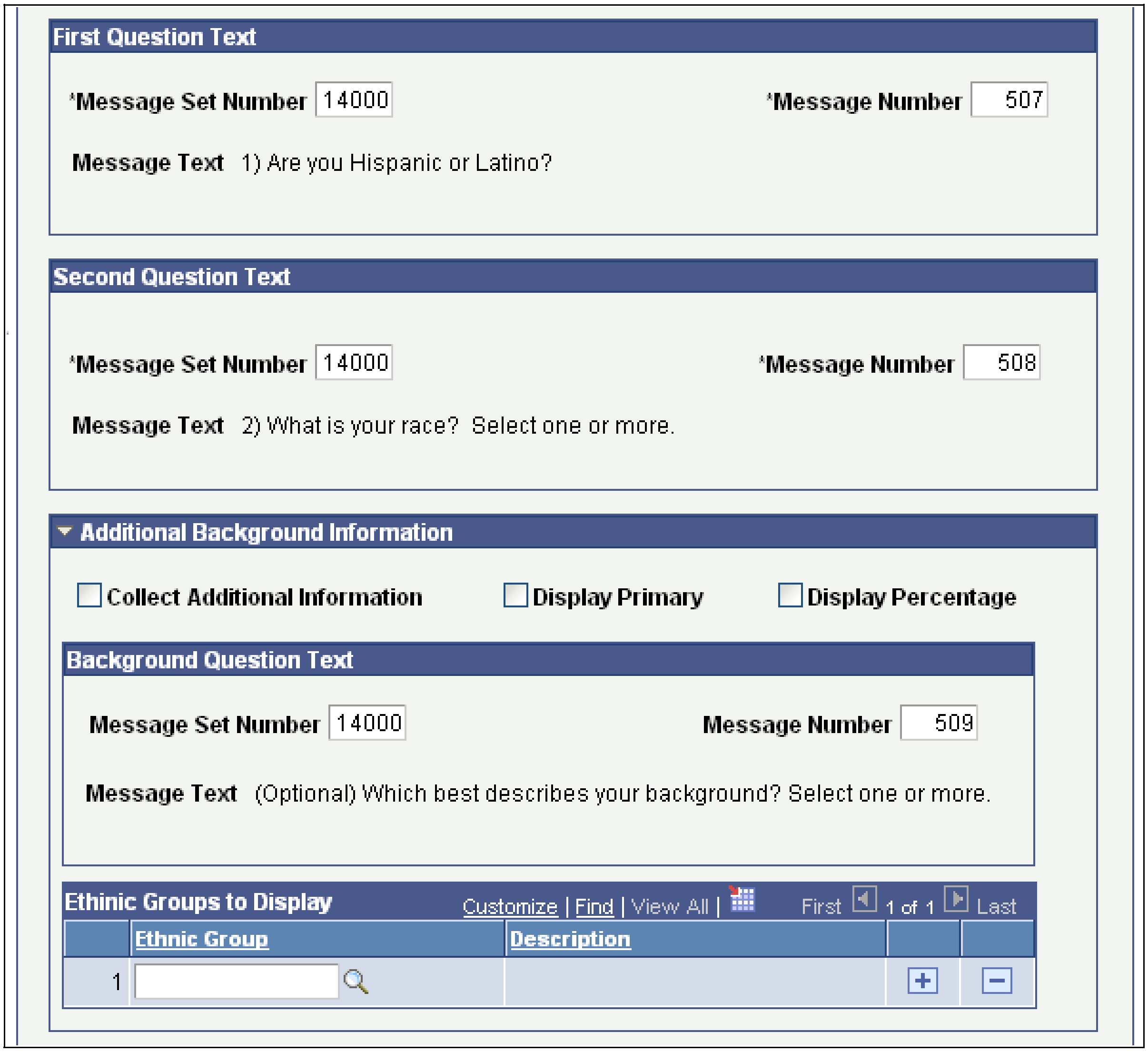
Page Name	*Definition Name*	*Navigation*	*Usage*
Self Service Ethnicity Setup	SCC_SS_ETHSTUP_USA	Set Up SACR, Common Definitions, Self Service, Self Service Ethnicity Setup	Allow and configure entry of ethnicity data on self-service pages.

Setting Up Self-Service Ethnicity Options

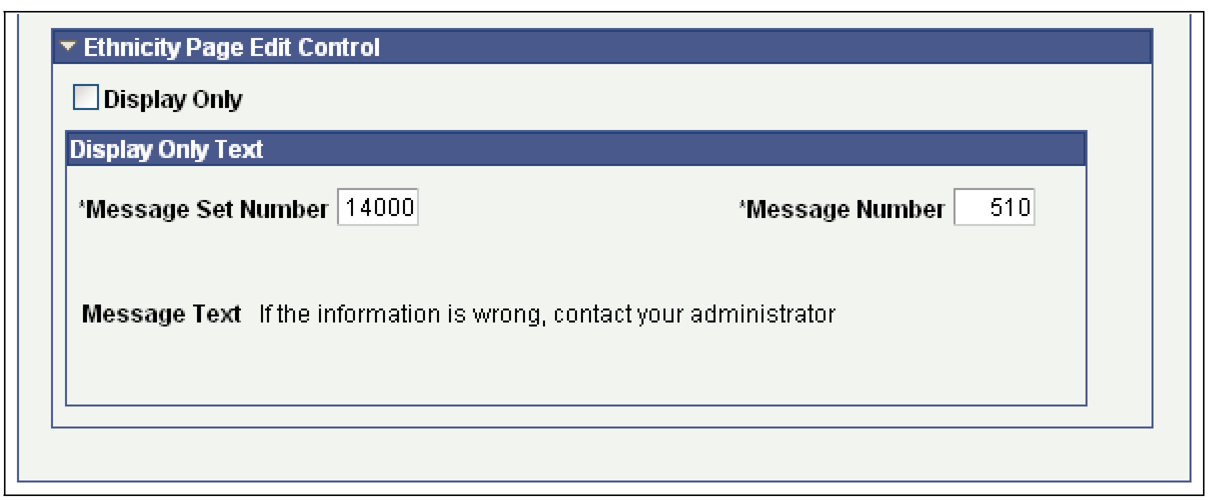
Access the Self Service Ethnicity Setup page (Set Up SACR, Common Definitions, Self Service, Self Service Ethnicity Setup).



Self Service Ethnicity Setup page (1 of 3)



Self Service Ethnicity Setup page (2 of 3)



Self Service Ethnicity Setup page (3 of 3)

This setup component enables institutions to define setup choices for each self-service center. The choices you make here affect the options that appear on the self-service Ethnicity page.

Answer Mapping

The selections made for these seven Answer Mapping values apply to all three self-service centers.

Hispanic

Select the value to be inserted into the Ethnicity records if the person answers Yes to the question "Are you Hispanic or Latino?" Only active, current Ethnic Group values with an EEO Ethnic Group = 3 (Hispanic) are returned in this prompt.

Not Hispanic

Select the value to be inserted into the Ethnicity records if the person answers No to the question "Are you Hispanic or Latino?" All active, current Ethnic Group values with an EEO Ethnic Group not equal to 6 (Not Specified) are returned in this prompt.

American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, and **No Response**

Select the value to be inserted into the Ethnicity records depending on the user's responses to the question "What is your race? Select one or more."

The prompts will return values respective to the EEO Ethnic Group related to the label as follows:

American Indian or *Alaska Native* returns only active current ethnic groups mapped to an EEO Ethnic Group = '5' (American Indian or Alaska Native).

Asian returns only active current ethnic groups mapped to an EEO Ethnic Group = '4' (Asian).

Black or *African American* returns only active current ethnic groups mapped to an EEO Ethnic Group = '2' (Black or African American).

Native Hawaiian or *Other Pacific Islander* returns only active current ethnic groups mapped to an EEO Ethnic Group = '7' (Native Hawaiian or Other Pacific Islander).

White returns only active current ethnic groups mapped to an EEO Ethnic Group = '1' (White).

No Response returns only active current ethnic groups mapped to an EEO Ethnic Group = '6' (Not Specified).

Note. Oracle strongly recommends that you create an appropriate generic ethnic group value for 'Not Hispanic' mapped to an EEO Ethnic Group = '6' and that other values selected on this page should be generic ethnic group values. For example, set Hispanic as a value for the 'Yes, Hispanic' answer or *Asian* for selecting the Asian check box when answering the second question.

Functional Area Setup

These fields are specific to the functional area selected – Student Center or Faculty Center – as determined by the selection made in the Functional Area field.

Campus Personal Information reflects the setup for either the Student Center or Faculty Center, depending on security setup for the user. For students, activate the Self Service Ethnicity component on the CC_PORTFOLIO_2 menu in a user's security setup. For faculty, active the Self Service Ethnicity component on the CC_PORTFOLIO_3 menu in a user's security setup. If both are activated in a user's security permission lists, two Ethnicity links appear in the menu. To avoid confusion, activate only one for a user at any time. For users without access to either Faculty Center or Student Center, the Self Service Ethnicity component will be part of the CC_PORTFOLIO component in the user's permission lists.

Functional Area The functional area you selected on the Self Service Ethnicity Setup search page appears here. It indicates for which component the setup choices apply. The delivered values are *Student Center* or *Faculty Center.*

Welcome Instructions/Text Enter the Message Set Number and Message Number to appear as introductory text, as well as the specific message to appear in the introductory section of the page. The Message Text field displays the text from the Message Catalog for the selected message number. The delivered message set number and message number for the Welcome Instructions are set as the defaults. The text of this message may be changed using the Message Catalog.

First Question Text Enter the Message Set Number and Message Number to appear as the first ethnicity question on the page. The Message Text field displays the text from the Message Catalog for the selected message number. The delivered message set number and message number for the First Question are set as the defaults. The text of this message may be changed using the Message Catalog.

Second Question Text Enter the Message Set Number and Message Number to appear as the follow-up ethnicity question on the page. The Message Text field displays the text from the Message Catalog for the selected message number. The delivered message set number and message number for the Second Question are set as the defaults. The text of this message may be changed using the Message Catalog.

Additional Background Information

Collect Additional Information Select this check box to indicate that the system displays a Background Information grid on the Self Service Ethnicity page to collect additional background detail. Collecting additional background information is optional and not required by IPEDS.

Display Primary Select this check box to indicate that the system displays a Primary column in the Background Information grid.

Display Percentage Select this check box to indicate that the system displays a Percentage column in the Background Information grid.

Background Question Text

If you selected the Collect Additional Information check box, enter the Message Set Number and Message Number to appear as the additional background question on the page. The Message Text field displays the text from the Message Catalog for the selected message number. The delivered message set number and message number when collecting additional background information are set as the defaults. The text of this message may be changed using the Message Catalog.

Ethnic Groups to Display

Enter ethnic group codes to appear in the Background Information grid as available choices. Only ethnic group codes selected here will be included in the Background prompt in the Self Service Ethnicity Page Background Information grid.

Note. If you choose to collect additional background information, the values selected to be displayed in self service should include at least one additional ethnic group for each of the racial categories, beyond what is selected in the Answer Mapping region for each racial category. In addition, it is recommended that you provide an 'Other' option for each racial category, such as Asian–Other, American Indian or Alaska Native–Other, and so on. This will provide the self-service user with a choice beyond those specific ethnic groups you have selected to display.

Ethnicity Page Edit Control

Display Only

Select this check box to indicate whether this page should be open for editing or appear as display-only information.

Display Only Text

If you select the Display Only check box, enter the Message Set Number and Message Number to appear on the page when the page is unavailable for editing. The Message Text field displays the text from the Message Catalog for the selected message number. The delivered message set number and message number that will be used when the page is Display Only are set as the defaults. The text of this message may be changed using the Message Catalog.

Setting Up FERPA Privacy Control

Setting Up Individual Relationships

To set up individual relationships, use the Relationships component (RELATIONSHIP_TABLE) and the Relationship/Marital Status component (MAR_STATUS_TABLE).

This section discusses how to:

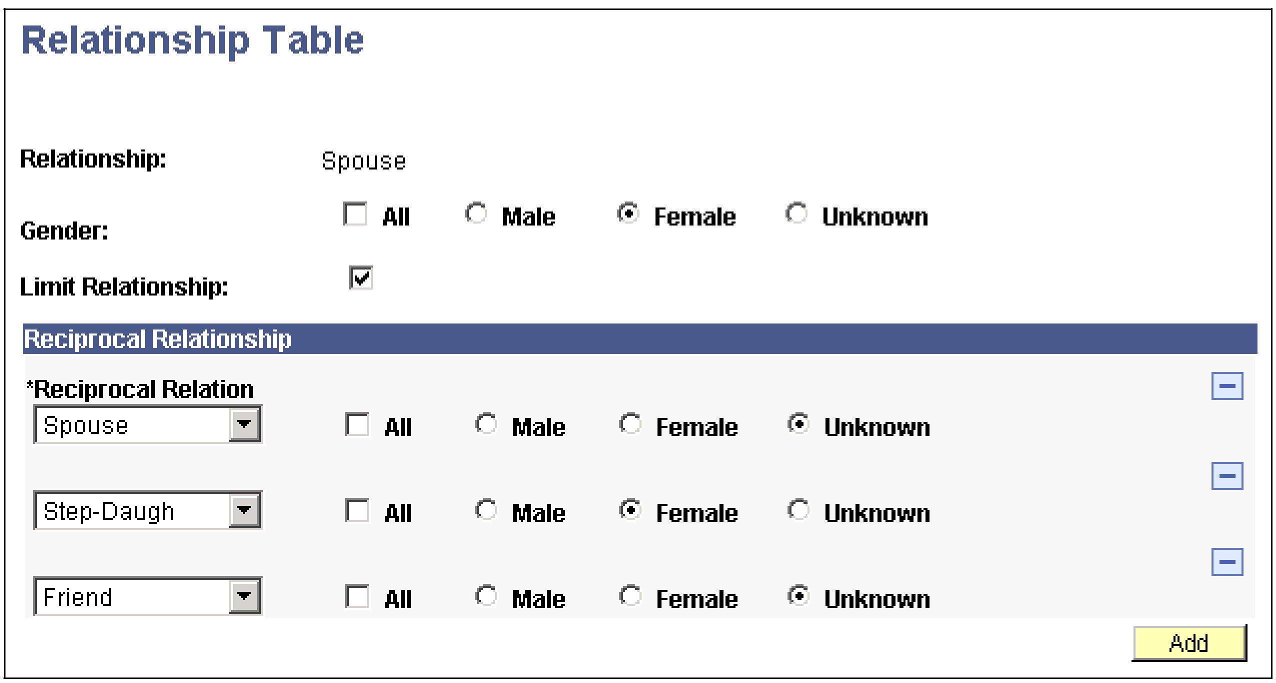
- Define reciprocal relationships.
- Enable marital status verification.

Pages Used to Set Up Individual Relationships

Page Name	Definition Name	Navigation	Usage
Relationship Table	RELATIONSHIP_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Relationship Table	Define reciprocal individual relationships.
Relationship/Marital Status	MAR_STATUS_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Relationship / Marital Status	Enable marital status so the system can verify the status when you create relationships between two individuals and warn you when data is inconsistent.

Defining Reciprocal Relationships

Access the Relationship Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Relationship Table) .



Relationship Table page

Relationship

The system displays the relationship (for example, mother, father, or employer) to modify or review.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Gender

Select the gender (such as male or female) that is associated with this relationship.

For example, the associated gender for the relationship of *Mother* is usually *Female.* For the relationship of *Spouse*, the gender could be either male or female, so you would select *All.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Limit Relationship

Select this check box to indicate that individuals can have only one of these relationships in your system at a time.

For example, if you are defining the relationship of *Mother* and you select the *Limit Relationship* option, the system does not permit an individual to have more than one mother. If you are defining the relationship of *Spouse,* you probably want to select the *Limit Relationship* option to prevent an individual from having more than one spouse at a time.

Reciprocal Relationship

If the Create Reciprocal Relationship check box is selected on the Campus Community Installation page, you must specify the reciprocal relationships and their associated genders here.

Reciprocal Relation

Identify the reciprocal relation associated with the relationship that you are defining. Each relationship can have up to three reciprocal relationships.

For example, the reciprocal relationships associated with *Mother* are *Daughter* and *Son,* and for *StepMother, StepDaughter,* and *StepSon.* You might also include *Oth Relat* (other related) to cover those whose gender is specified as *Unknown* on the Biographical Details page.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Gender

Select the gender that is associated with the reciprocal relationship specified. Select either *All,* or *Male, Female*, or *Unknown.*

For example, for *Daughter,* the associated gender is *Female.* For *Son,* it is *Male.*

Note. You can select the gender of *All* when only one reciprocal relationship exists. However, you cannot select *All* when a relationship has several reciprocals.

Enabling Marital Status Verification

Access the Relationship/Marital Status page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Relationship / Marital Status).

Relationship/Marital Status page

Marital Status

Select the marital status to verify, usually *Married.*

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Relationship

Specify the relationship type to verify in association with the specified marital status, typically the status of *Married* and the relationship of *Spouse.*

Setting Up Relations to the Institution

To set up relations to the institution, use the Legacy Table component (LEGACY_TABLE).

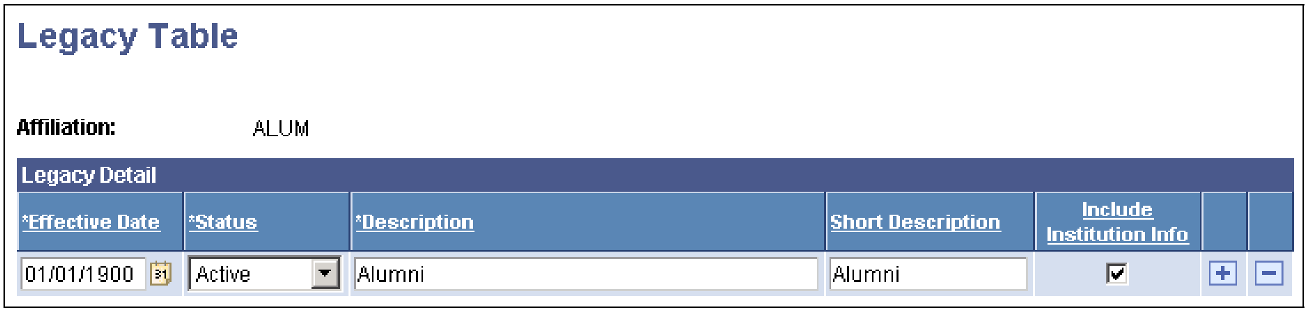
This section discusses how to define or review legacy affiliation types that are used to identify relations to the institution.

Page Used to Set Up Relations to the Institution

Page Name	*Definition Name*	*Navigation*	*Usage*
Legacy Table	INST_AFFIL_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Legacy Table	Define the types of legacy affiliations that individuals can have with your institution.

Defining Legacy Affiliation Types

Access the Legacy Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Legacy Table).



Legacy Table page

Include Institution Info

Select this check box to include the academic information relevant to the specified legacy relationship when this affiliation is selected for the related individual on the Legacy Information page in the Relationship component.

For example, if you want to know the institution that a related individual with this affiliation attended, and the academic program in which he or she was enrolled, select the *Include Institution Info* check box to ensure that the institution and academic program fields will be available on the Legacy Information page.

Setting Up Emergency Contacts Data

There is no specific setup for emergency contacts data. However, before you can enter emergency contacts for an individual, names and addresses must be set up and the individual whose contacts you want to enter must exist in your database.

(USA) Setting Up Work Experience Classification Codes

To set up work experience classification codes, use the Standard Industry Table component (US_SIC_TABLE) and the Standard Occupation Table component (US_SOC_TABLE).

This section discusses how to:

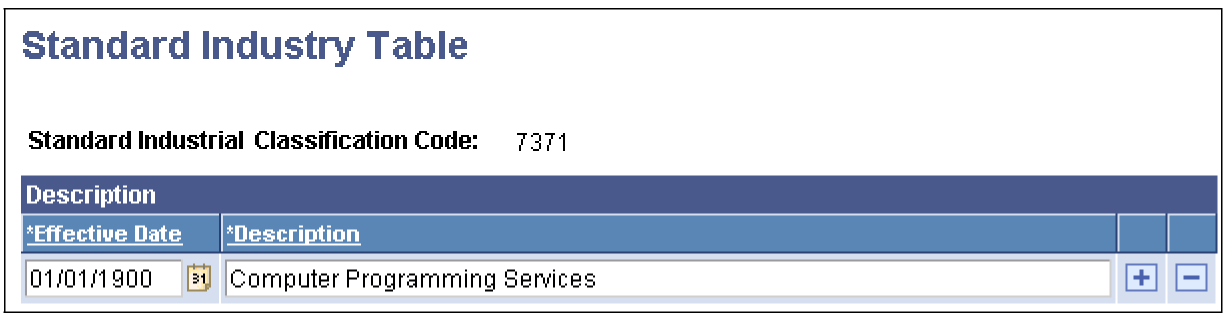
- Add or review Standard Industry Classification (SIC) codes.
- Add Standard Occupation Classification (SOC) codes.

Pages Used to Set Up Work Experience Classification Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Standard Industry Table	US_SIC_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Standard Industry Table	Add or review valid Standard Industry Classification (SIC) codes.
Standard Occupation Table	US_SOC_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Standard Occupation Table	Add or review the valid Standard Occupation Classification (SOC) codes.

Adding or Reviewing SIC Codes

Access the Standard Industry Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Standard Industry Table).



Standard Industry Table page

PeopleSoft delivers your system with SIC codes loaded in the table. Your institution is responsible for making sure the codes are current and that they reflect any changes made by the U.S. Department of Labor.

Note. If you use HRMS, the SIC codes required by your institution might already exist in your system.

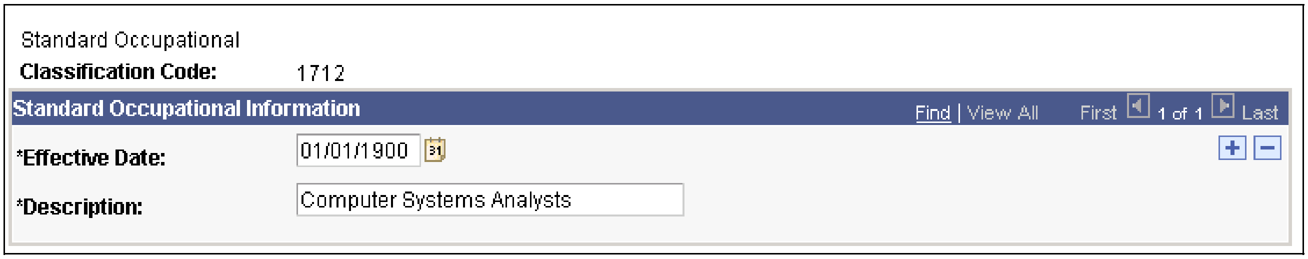
See Also

U.S. Department of Labor (which publishes the SIC codes list)

PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,"Setting Up Jobs"

Adding SOC Codes

Access the Standard Occupation Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Standard Occupation Table).



Standard Occupation Table page

PeopleSoft ships your system with SOC codes loaded in the table. Your institution is responsible for making sure that the codes are current and that they reflect any changes made by the U.S. Department of Labor.

Note. If you implemented HRMS, the SOC codes required by your institution might already exist in your system.

See Also

U.S. Department of Labor (which publishes the SOC codes list)

PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,"Setting Up Jobs"

Chapter 8

(NZL) Setting Up for NSI Processing

This section provides an overview of National Student Index (NSI) processing setup and discusses how to:

- Access the NSI website.
- Set up NSI change processing.

Understanding NSI Processing Setup

The New Zealand Ministry of Education maintains the NSI and assigns National Student Numbers (NSNs). The Ministry requires that you maintain certain data for students, that you report any changes to that data, and that you request NSNs for students at your institution who do not have NSNs.

Note. It is important that you clearly understand the New Zealand Ministry of Education NSI process before you begin using PeopleSoft NSI functionality. Consult the Guide to Integrating with National Student Index (GINS) available on the Ministry of Education web site www.minedu.govt.nz. The PeopleSoft solution is based on Version 2.0 - May 2002 of the GINS document.

PeopleSoft provides batch processes to facilitate the exchange of information to and from NSI. The processes are discussed in the (NZL) Managing NSI Data section.

To facilitate NSI change reporting, you can set your PeopleSoft system to automatically add updated records to the NSI Suspense Table when online changes are made to any of the required NSI fields. The NSI Suspense Table is the repository for data that you want to send to NSI and for the data that you receive back from NSI. With updated records automatically added to the suspense table, the latest data is in one place, ready to extract and send to NSI.

To set up NSI change processing:

1. Select the Enable Online NSI Processing check box on the Extensions page of the CC Installation component to enable the functionality.

   When this check box is selected, any changes made to an ID that is NSI enabled (step 4) will trigger Integration Broker to determine if the change is to a required NSI field. (A list of NSI fields is provided in the "Managing NSI Data" section of this PeopleBook.)

2. Activate PeopleTools Integration Broker to either insert a row inside the NSI Suspense Table at save time when a change is made with a current effective date inside the Add/Update a Person component (SCC_BIO_DEMO_DATA), or to insert a row inside the NSI Future Suspense table (SCC_NSI_SUSFUTR) when a change is made with a future effective date.

3. Run the Suspense Futures application engine program (SCCNSISUSFUT) to move data from the NSI Future Suspense table to the NSI Suspense Table when a change with a future date becomes current.

4. For each student with an NSN, confirm that the NSI Processing Enabled check box is selected on the Regional page of the Add/Update a Person component.

 Note. The Request NSN process (CCNSIRQN), which is the process that identifies students in your database who need NSNs, selects the NSI Processing Enabled check box as part of the process. You can also select the check box manually.

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 and Chapter 38, "(NZL) Managing NSI Data," Requesting NSNs, page 511.

Accessing the NSI Website

To access the NSI, you must request a login ID and password from the New Zealand Ministry of Education and be able to access the Ministry of Education website.

Setting Up NSI Change Processing

This section discusses how to:

- Enable NSI change processing.
- Activate PeopleTools Integration Broker for NSI.
- Schedule the NSI Suspense Future program.

Enabling NSI Change Processing

Select the Enable Online NSI Processing check box on the Extensions page of the CC Installation component.

Activating PeopleTools Integration Broker for NSI

In PeopleSoft Application Designer, set the PERSON_BASIC_SYNC message subscription SCC_NSI_PERSON_SYNC to *Active.*

In PeopleTools Integration Broker, verify or add the transaction message PERSON_BASIC_SYNC with an *Active* status to the InAsync and OutAsync node definitions for the "internal" version.

In PeopleTools Integration Broker, verify that service operation monitor is set to PERSON_DATA with a status of *Running.*

See *PeopleTools: PeopleSoft Application Designer Developers Guide, "Using PeopleSoft Application Designer," Viewing and Editing Definition Properties*

See *PeopleTools: Integration Broker Administration*

See *PeopleTools: Integration Broker*

Scheduling the NSI Suspense Future Program

In PeopleSoft Application Engine, schedule the Suspense Future program (SCCNSISUSFUT) with a process frequency of *Always* and a recurrence that runs once per day sometime after midnight but before the opening of business (for example, *EffectiveDateChange*).

See *PeopleTools: PeopleSoft Application Engine, "Managing Application Engine Programs, Running Application Engine Programs"*

Chapter 9

(USA) Setting Up PeopleSoft SEVIS Solution Visa Processing for J and F/M Visas

This chapter discusses how to:

- Set up Student and Exchange Visitor Information System (SEVIS) visa processing.
- Set up F and M visas processing.
- Set up J visas processing.
- Set user defaults for visa processing.

Setting Up SEVIS Visa Processing

To set up general SEVIS visa processing, use the following components: SEVIS Setup (SEV_SETUP_TBL), Country Mapping (SEV_COUNTRY_MAP), Visa Mapping (SEV_VISA_MAP), Suffix Mapping (SEV_SUFFIX_MAP), SEVIS Event Types (SEV_EVENT_TYPE) and SEVIS File Errors (SEV_FILE_ERROR).

This section discusses how to:

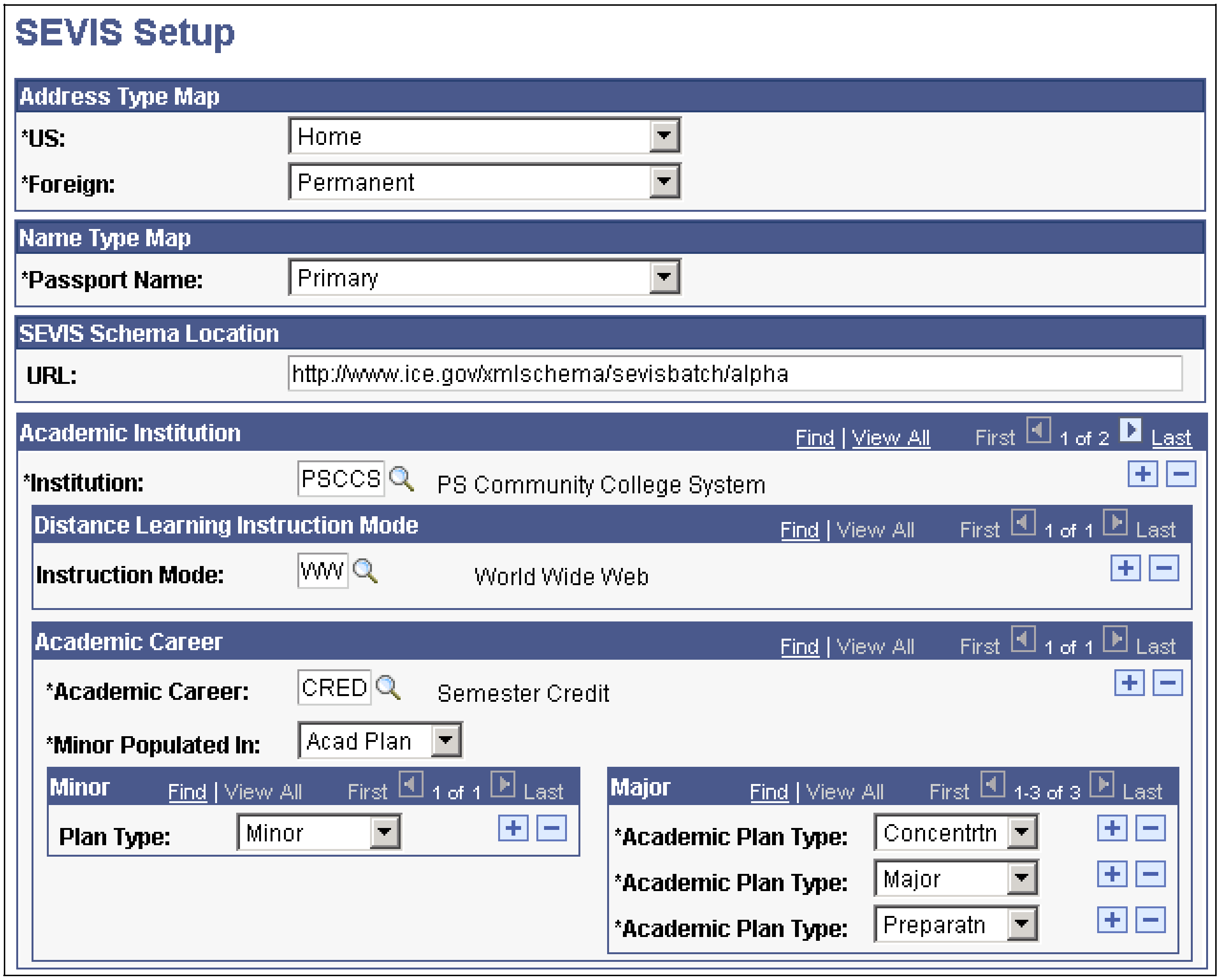
- Define your institution.
- Map to SEVIS country data.
- Map to SEVIS visa types.
- Map to SEVIS name suffixes.
- Map to SEVIS event types.
- Define SEVIS file error messages.

Pages Used to Set Up SEVIS Visa Processing

Page Name	***Definition Name***	***Navigation***	***Usage***
SEVIS Setup	SEV_SETUP_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Setup	Specify details about your institution for student F and M visas or exchange visitor J visas.
Country Mapping	SEV_COUNTRY_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Country Mapping	Reference the PeopleSoft and SEVIS country information for student F and M visas or exchange visitor J visas.
Visa Mapping	SEV_VISA_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Visa Mapping	Reference the PeopleSoft and SEVIS visa type information for student F and M visas or exchange visitor J visas.
Suffix Mapping	SEV_SUFFIX_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Suffix Mapping	Reference the PeopleSoft and SEVIS name suffix information for student F and M visas or exchange visitor J visas.
SEVIS Event Types	SEV_EVENT_TYPE	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Event Types	Set up event types for your institution for student F and M visas or exchange visitor J visas.
SEVIS File Errors	SEV_FILE_ERROR	Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Setup, SEVIS File Errors	Reference the DHS file upload error messages for student F and M visas or exchange visitor J visas.

Defining Your Institution

Access the SEVIS Setup page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Setup).



SEVIS Setup page

Warning! You must define all careers used in SEVIS on the SEVIS Setup page and map at least one major academic plan type for each career. If you do not do this, you cannot view the primary and secondary majors on the I-20 form for F and M visas or the subject field codes on the DS-2019 J visas form, and the alerts process extracts a blank value.

Address Type Map

US	Select the address type in the United States to report to SEVIS.
Foreign	(F and M visas only) Select the address type in the student's country of citizenship to report to SEVIS.

Name Type Map

Passport Name	Select the name type to report to SEVIS. This name appears on the I-20 or DS-2019 form.

SEVIS Schema Location

URL

Enter the URL to send the data to, based on the SEVIS schema that you use (production, beta test, or alpha test). Do not put a backslash at the end of the file path.

The Export SEVIS Events - F/M process and the Export SEVIS Events - J process inserts this location in the xml file that it produces. If you do not enter the schema location, the process will produce the xml file without the schema location and the file will be rejected by SEVIS.

The locations for each SEVIS environment are:

Warning! These values may change according to updates in the API. You may need to modify them accordingly.

Production – http://www.ice.gov/xmlschema/sevisbatch

Beta Test – http://www.ice.gov/xmlschema/sevisbatch/beta

Alpha Test – http://www.ice.gov/xmlschema/sevisbatch/alpha

Academic Institution

Institution

Select the institution for which you are setting up SEVIS information.

Distance Learning Mode of Instruction

Instruction Mode

Select the mode by which Distance Learning courses are presented, for example *Television, Correspondence, World Wide Web,* and so on.

Only one distance learning class can be used toward full time. The Auth Drop Below FC logic uses the Instruction Mode to find the distance learning class with the greatest number of units and uses it in calculating full time.

Academic Career

Academic Career

Select the academic career used at your institution.

Minor Populated In

For F/M visa processing only. Does not apply to J visas.

Select either *Acad Plan* or *Sub Plan.*

Minor

For F/M visa processing only. Does not apply to J visas. The field and available choices in the Minor group box change according to your selection in the Minor Populated In field.

Plan Type

If you enter *Acad Plan* in the *Minor Populated In* field, the Plan Type field appears, and academic plans are available for selection.

You must enter the type of academic plan. Select from:

Concentrntn (concentration)

Honors

Major

Minor

Prepratn (preparation)

ROTC (Reserve Officer Training Corps)

Specialztn (specialization)

The SEVIS Alerts – F/M process uses this value to determine which academic plan to extract as a minor.

Sub-Plan Type

If you enter *Sub Plan* in the Minor Populated In field, the Sub-Plan Type field appears and subplans are available for selection.

You must enter the type of subplan. Values are:

Conc (concentration)

Emphasis

Minor

Option

Spec(specialization)

Track

The SEVIS Alerts - F/M process uses this value to determine which subplan to extract as a minor.

Major (for F and M visas, and for J visas)

Academic Plan Type

For each academic career, select the academic plan type for the SEVIS Alerts process and the visa form logic to use.

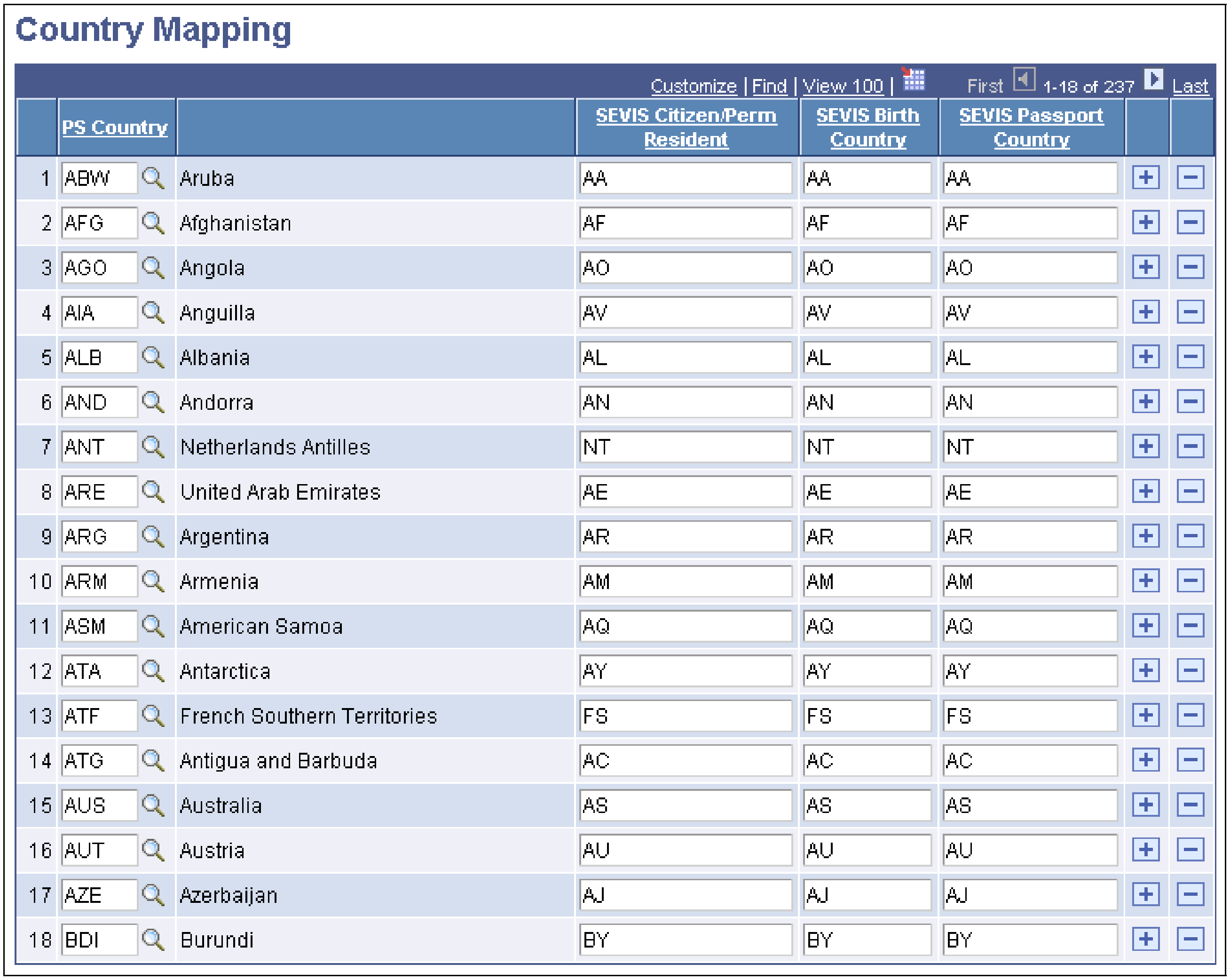
Select from *Concentrntn* (concentration), *Honors*,*Major*,*Minor*,*Prepratn* (preparation), *ROTC* (Reserve Officer Training Corps), and *Specialztn* (specialization).

For F/M visas, the SEVIS Alerts – F/M process uses this logic to determine the primary and secondary majors to enter on the I-20 form.

For J visas, the SEVIS Alerts – J process uses this logic to determine the subject field code to enter for the student category exchange visitors on the DS-2019 form.

Mapping to SEVIS Country Data

Access the Country Mapping page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Country Mapping).



Country Mapping

Customize | Find | View 100 | First 1-18 of 237 Last

	PS Country		SEVIS Citizen/Perm Resident	SEVIS Birth Country	SEVIS Passport Country
1	ABW	Aruba	AA	AA	AA
2	AFG	Afghanistan	AF	AF	AF
3	AGO	Angola	AO	AO	AO
4	AIA	Anguilla	AV	AV	AV
5	ALB	Albania	AL	AL	AL
6	AND	Andorra	AN	AN	AN
7	ANT	Netherlands Antilles	NT	NT	NT
8	ARE	United Arab Emirates	AE	AE	AE
9	ARG	Argentina	AR	AR	AR
10	ARM	Armenia	AM	AM	AM
11	ASM	American Samoa	AQ	AQ	AQ
12	ATA	Antarctica	AY	AY	AY
13	ATF	French Southern Territories	FS	FS	FS
14	ATG	Antigua and Barbuda	AC	AC	AC
15	AUS	Australia	AS	AS	AS
16	AUT	Austria	AU	AU	AU
17	AZE	Azerbaijan	AJ	AJ	AJ
18	BDI	Burundi	BY	BY	BY

Country Mapping page

Note. The DHS defines the SEVIS country values in the lookup tables section of *Application Program Interface Document (API).* The DHS may update the country codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Warning! The U.S. Minor Outlying Islands (UMIs) are not mapped to one DHS SEVIS country code. The PeopleSoft system uses International Standards Organization (ISO) country codes, which do not include separate country codes for each island. SEVIS, however, uses country codes defined by the Federal Information Processing Standards (FIPS 10-4), National Imagery and Mapping Agency, which include separate codes for each island – Baker Island (FQ), Holland Island (HQ), Jarvis Island (DQ), Johnston Island (JQ), Midway Island (MQ), Mavassa Island (BQ), Palmyra Island (LQ) and Wake Island (WQ). Your institution must determine the SEVIS code to map for UMIs.

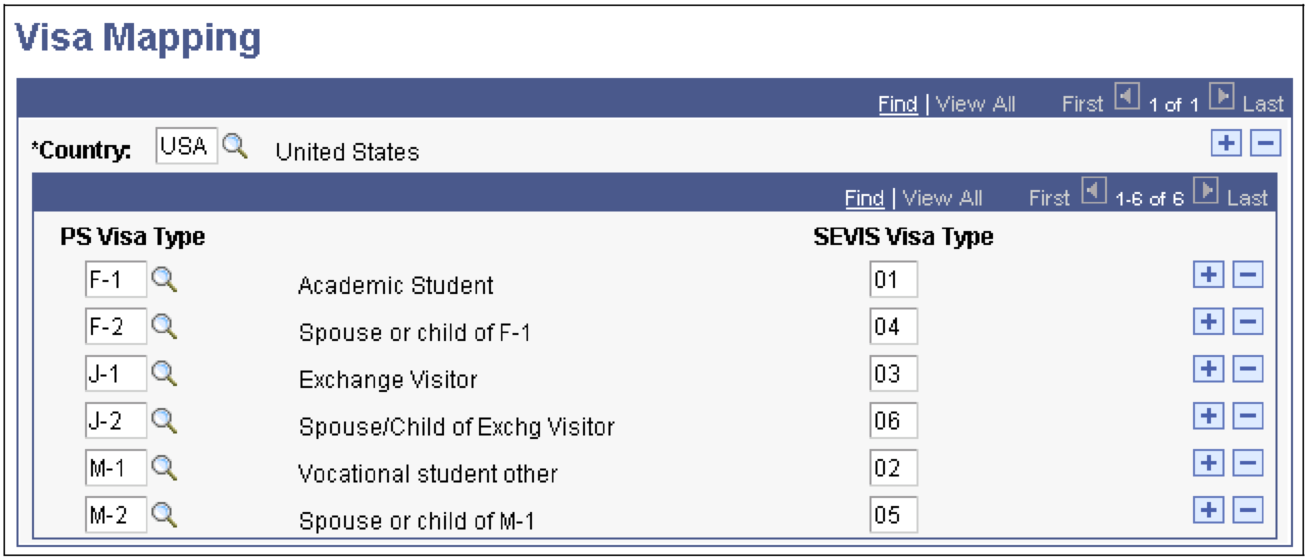
Also, the following countries (listed alphabetically by FIPS code) do not exist in the PeopleSoft County Table and are therefore not mapped: Ashmore and Cartier Islands (AT), Burma (BM), Navassa Island (BQ), Bassas Da India (BS), Central and Southern Line Islands (CL), Coral Sea Islands (CR), Czechoslovakia (CZ), Canton and Enderbury (EQ), Europa Island (EU), French Territory of the Afars and Issas (FT), German Democratic Republic (GC), Federal Republic of Germany (GE), Guernsey (GK), Gilbert and Ellice Islands (GN), Glorioso Islands (GO), Gilbert Islands (GS), Gaza Strip (GZ), Isle Of Man (IM), Clipperton Island (IP), United States Misc. Pacific Islands (IQ), Israel-Syria Demilitarized Zone (IU), Demilitarized Zone (IW), Iraq-Saudi Arabia Neutral Zone (IY), Jersey (JE), Jan Mayen (JN), Juan De Nova Island (JQ), Svalbard and Jan Mayen (JS), Kingman Reef (KQ), Spanish North Africa (ME), Montenegro (MW), Paracel Islands (PF), Spratly Islands (PG), Canal Zone (PQ), Portuguese Timor (PT), Southern Rhodesia (RH), Sikkim (SK), Swan Islands (SQ), Serbia (SR), Spanish Sahara (SS), Tromelin Island (TE), Trust Territory of The Pacific Islands (TQ), Union of Soviet Socialist Republics (UR), Uzbekistan (UZ), Democratic Republic of Viet-Nam (VN), Republic of Viet-Nam (VS), West Bank (WE), Wake Atoll (WQ), Yeman (Sanaa) (YE), Serbia and Montenegro (YI), Southern Ryukyu Islands (YQ), and Yemen (Aden) (YS).

The codes for Neutral Zone (U2), Stateless (U3), and Unknown (U5) are also not mapped.

PS Country	Enter the country code used by the PeopleSoft system.
SEVIS Citizen/Perm Resident,SEVIS Birth Country, and **SEVIS Passport Country**	Enter the Federal Information Processing Standards (FIPS) country code used by SEVIS.

Mapping to SEVIS Visa Types

Access the Visa Mapping page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Visa Mapping).



Visa Mapping page

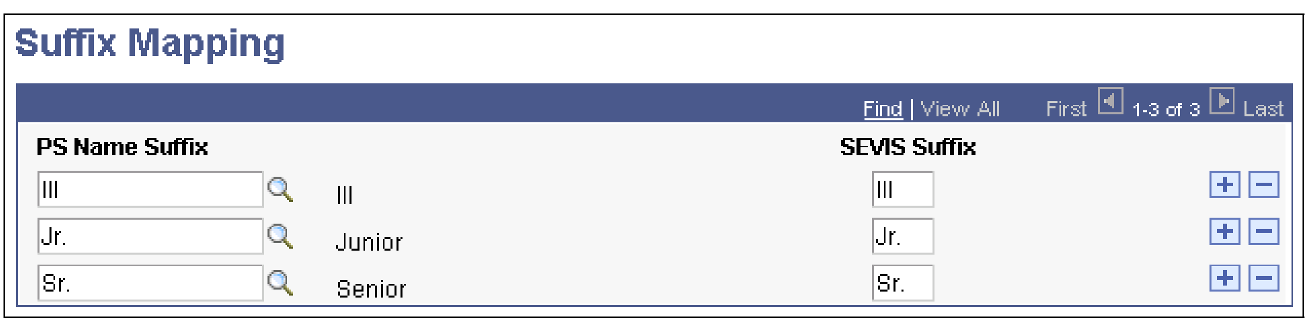
Note. You must map each SEVIS visa type defined in *Application Program Interface (API)* to a PeopleSoft visa type. Consult the U.S. Immigrations and Customs Enforcement (ICE) web site.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Country	Select the country to which the student is traveling. This is USA for SEVIS use.
PS Visa Type (PeopleSoft visa type)	Enter the PeopleSoft visa type code.
SEVIS Visa Type	Enter the visa type code established by SEVIS.

Mapping to SEVIS Name Suffixes

Access the Suffix Mapping page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, Suffix Mapping).



Suffix Mapping page

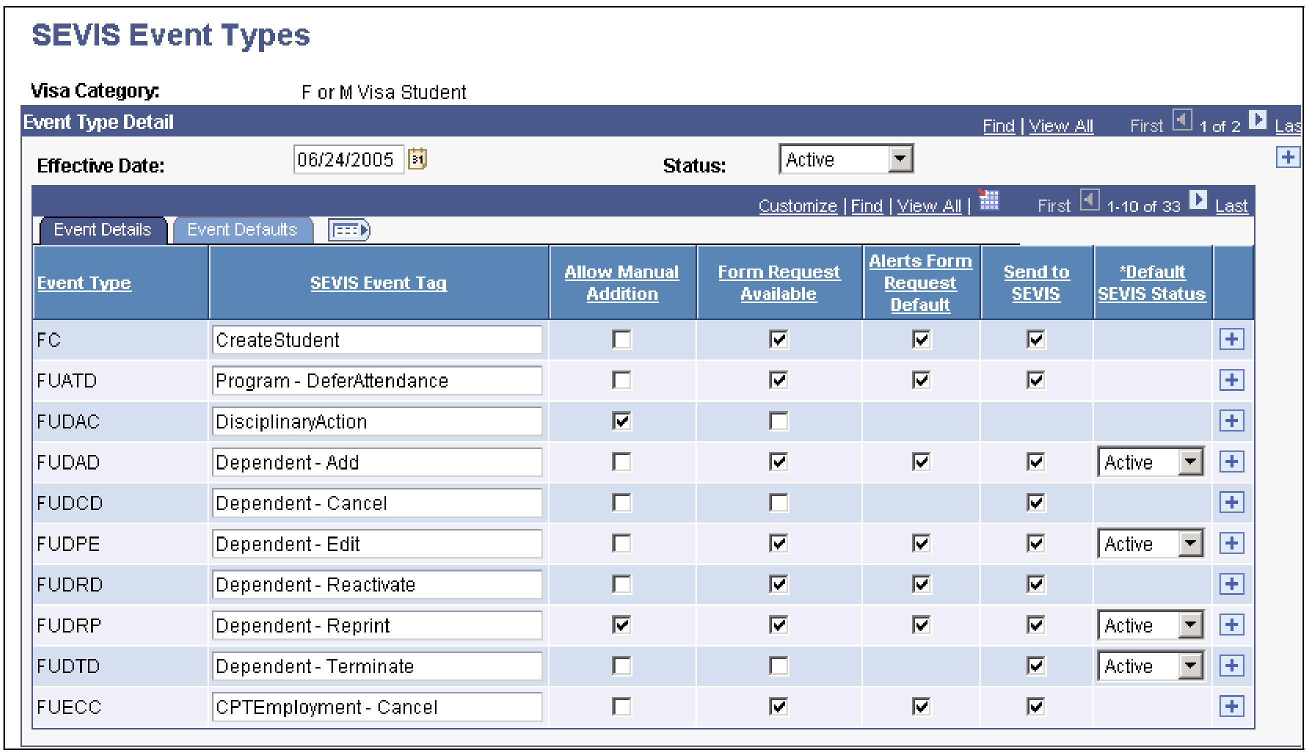
Note. The DHS defines the SEVIS suffix values in the lookup tables section of the *Application Program Interface (API).* The DHS may update the suffix codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS. Consult the U.S. Immigrations and Customs Enforcement (ICE) web site.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

PS Name Suffix (PeopleSoft name suffix)	Select a name suffix from the available options.
SEVIS Suffix	Enter the corresponding DHS SEVIS name suffix for the selected PeopleSoft name suffix.

Mapping to SEVIS Event Types

Access the SEVIS Event Types page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Event Types).



SEVIS Event Types

Visa Category: F or M Visa Student

Event Type Detail — Find | View All — First 1 of 2 Last

Effective Date: 06/24/2005 — Status: Active

Customize | Find | View All — First 1-10 of 33 Last

Event Details | Event Defaults

Event Type	SEVIS Event Tag	Allow Manual Addition	Form Request Available	Alerts Form Request Default	Send to SEVIS	*Default SEVIS Status
FC	CreateStudent	☐	☑	☑	☑	
FUATD	Program - DeferAttendance	☐	☑	☑	☑	
FUDAC	DisciplinaryAction	☑	☐			
FUDAD	Dependent - Add	☐	☑	☑	☑	Active
FUDCD	Dependent - Cancel	☐	☐		☑	
FUDPE	Dependent - Edit	☐	☑	☑	☑	Active
FUDRD	Dependent - Reactivate	☐	☑	☑	☑	
FUDRP	Dependent - Reprint	☑	☑	☑	☑	Active
FUDTD	Dependent - Terminate	☐	☐		☑	Active
FUECC	CPTEmployment - Cancel	☐	☑	☑	☑	

SEVIS Event Types page

Note. The DHS defines the SEVIS events in *Application Program Interface Document (API).*

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Event Type

Displays the PeopleSoft event type codes for the visa category entered (either F/M visas or J visas). The SEVIS Alerts process and pages use these codes.

Warning! Do *not* change or delete event types. Doing so affects the alerts processing.

SEVIS Event Tag

Enter the DHS description of the event.

You can modify event tags.

Allow Manual Addition

Select to enable manual addition of this event type on the SEVIS Alerts Header page.

DSOs can make manual additions on the Alerts Header page to submit certain data to SEVIS for when student updates are not detected as data changes in the PeopleSoft Campus Solutions system.

The delivered F/M visa event types that allow manual addition are:

Dependent – *Reprint*

AuthDropBelowFC – *Add*

AuthDropBelowFC – *Cancel*

AuthDropBelowFC – *Edit*

Status – *Complete*

Reprint

Disciplinary Action

Status – *Terminate*

ROs can make manual additions on the Alerts Header page to submit certain data to SEVIS for when exchange visitor updates are not detected as data changes in the PeopleSoft Campus Solutions system.

The delivered J visa event types that allow manual addition are:

Dependent – *Reprint*

Reprint

Status – *Invalid*

Status – *NoShow*

Status – *End*

Status – *Correct Infraction*

Status – *Terminate*

Status – *Validate*

Form Request Available	Select to indicate that a new PDF form file (I-20 for F/M visas or DS-2019 for J visas) can be requested for this event. When this is selected, the New Form check box is available on the Alerts Header page. PeopleSoft delivers the Form Request Available check box selected or not selected based on the information in the *Application Program Interface (API)* document. Do not modify this. See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.
Alerts Form Request Default	Select to automatically select the New Form check box on the SEVIS Alerts Header page when this event type is detected. PeopleSoft delivers the Alerts Form Request Default check box selected or not selected based on the information in the *Application Program Interface (API)* document. You can modify it based on your institution's preferences. See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.
Send to SEVIS	Select to automatically set the Send To field on the Alerts Header page to *SEVIS* when this event type is detected. The Send to SEVIS check box is available when additional data is not required for the event type. (See the Addl Data column description for a list of event types and their additional data status.)
Default SEVIS Status	*Applies to F/M visas only. Does not apply to J visas.* This field appears only for events that can be triggered for a SEVIS status of *Active* or *Initial.* Select the status to use as the default when sending an update event if an Education Level – Change event has been previously sent to SEVIS. SEVIS uses this value to determine which record to update when an Education Level – Change event creates a second record with a SEVIS status of *Initial.* You can override the default status value on the Select Alerts to Report – F/M component.
Compare Detail	When selected, causes a detail subpage to be available from the Select Alerts to Report component showing the changed data that caused the event to trigger. This value is preset in the system based on events where data differences can trigger the event.

Addl Data additional data)

Displays the value based on the event type.

No Addl = Additional data is neither required nor permitted.

Reqd Data = Additional data is required and must be entered on the Addl Data page of the Select Alerts to Report component to send the event to SEVIS.

The F/M event types for which additional data is required are:

Disciplinary Action

Status - *Terminate*

AuthDropBelowFC - *Add*

AuthDropBelowFC - *Edit*

Dependent - *Reprint*

Reprint

Program - *Extension*

The J event types for which additional data is required are:

Dependent - *Add*

Dependent - *Reprint*

Program - *Shorten*

Program - *EditSubject*

Reprint

Status - *Invalid*

Status - *Terminate*

Status - *Correct Infraction*

Status - *End*

Addl Data = Additional data optional on the Addl Data page of the Select Alerts to Report component.

The F/M event types for which additional data is optional are:

Program - *Edit*

Program - *Cancel Extension*

Education Level - *Change*

Education Level - *Cancel*

Personal Info

Status - *Complete*

Program - *Shorten*

Program - *Defer Attendance*

Registration

Status - *Cancel*

The J event types for which additional data is optional are:

Biographical

Program - Amend

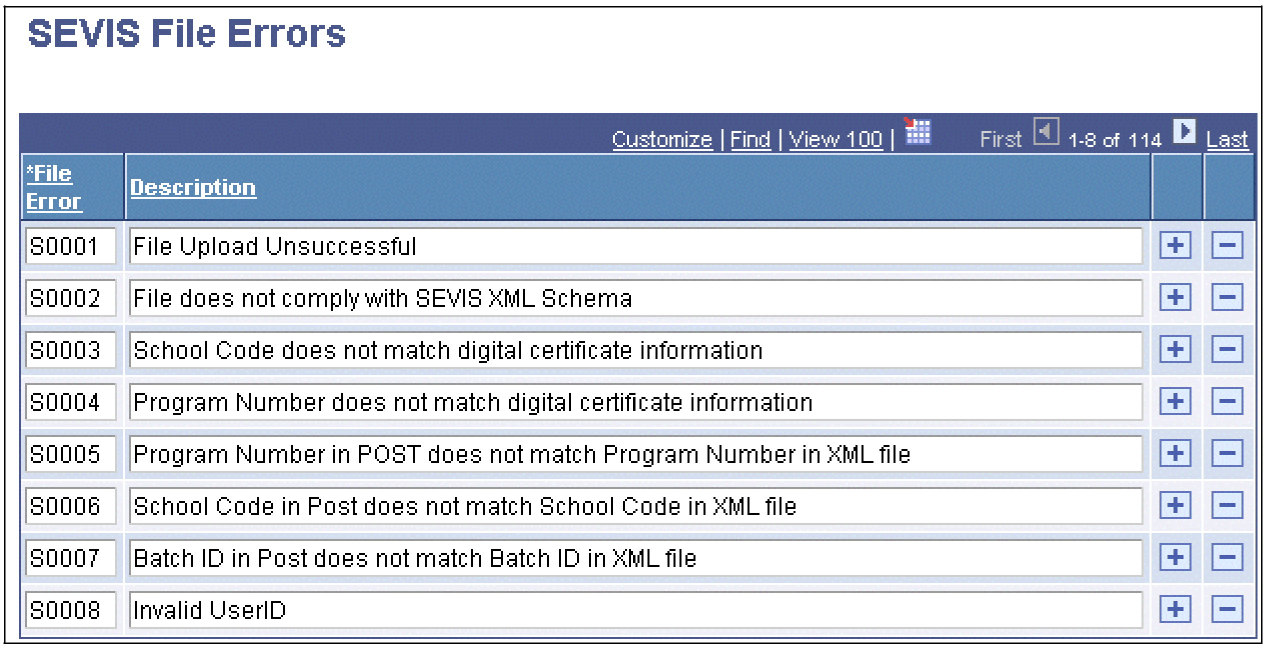
Program - Extension

Dependent - Edit

Site of Activity - Edit

Defining SEVIS File Error Messages

Access the SEVIS File Errors page (Set Up SACR, Product Related, Campus Community, SEVIS, Common Definitions, SEVIS Setup, SEVIS File Errors).



SEVIS File Errors

Customize | Find | View 100 | First 1-8 of 114 Last

*File Error	Description
S0001	File Upload Unsuccessful
S0002	File does not comply with SEVIS XML Schema
S0003	School Code does not match digital certificate information
S0004	Program Number does not match digital certificate information
S0005	Program Number in POST does not match Program Number in XML file
S0006	School Code in Post does not match School Code in XML file
S0007	Batch ID in Post does not match Batch ID in XML file
S0008	Invalid UserID

SEVIS File Errors page

Note. The DHS defines the SEVIS file errors in the Appendix B: SEVIS Batch Process Error Codes section in *Application Program Interface (API).* The DHS may update the error messages from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

File Error

Enter the DHS error code.

Enter the error codes and their descriptions that are used on the PeopleSoft SEVIS Import Results pages.

If there are errors, SEVIS includes the file upload error code in the transaction log result files that it returns to you.

Description	Enter the DHS description of the error code.

Setting Up F and M Visas Processing

To set up F and M visas processing, use the following components: SEVIS School Code Table (SEV_SCHL_CD_TBL), Dept of State Post Code Table (SEV_DOS_TBL), Port of Entry Table (SEV_POE_TBL), Fee Code Table (SEV_FEE_TBL), I-20 Template (SEV_I20_TMPLT), and Visa/Level of Education Map (SEV_LVL_VSA_TBL).

This section discusses how to do the following for student F and M visas:

- Set up SEVIS school codes.
- Define the institution for a school code.
- Set up SEVIS school code security.
- Set up U.S. Department of State postal codes.
- Set up port of entry data.
- Map SEVIS visa types to levels of education.
- Set up SEVIS fee codes.
- Create an I-20 form template.

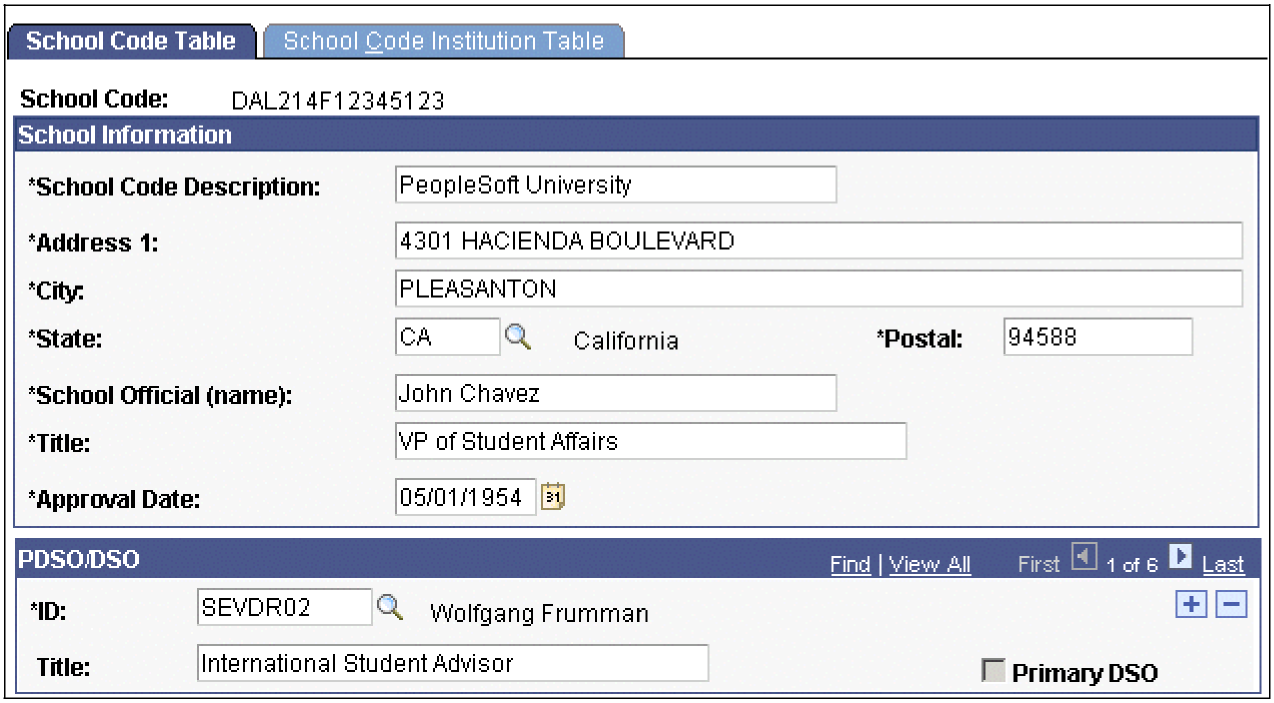
Pages Used to Set Up F and M Visas Processing

Page Name	***Definition Name***	***Navigation***	***Usage***
School Code Table	SEV_SCHL_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table	Set up school and designated school officials information for F and M student visas.
School Code Institution Table	SEV_SCHL_CD2_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table, School Code Institution Table	Set up academic institution and academic career information for F and M student visas.
SEVIS School Code Security	SEV_SCHLCD_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, SEVIS, School Code Security	Set F and M visas school code security access for a user.

Page Name	***Definition Name***	***Navigation***	***Usage***
Dept of State Post Code Table	SEV_DOS_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Dept of State Post Code Table	Reference the Department of State post code information for F and M student visas.
Port of Entry Table	SEV_POE_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Port of Entry Table	Reference the DHS port of entry information for F and M student visas.
Visa/Level of Education Map	SEV_LVL_VISA_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Visa/Level of Education Map	Determine the levels of education that are available for F and M classification students on the I-20 form. For example, the Flight Training level is only valid for M-1 students.
Fee Code Table	SEV_FEE_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Fee Code Table	Set up the fee code information to use with the I-20 template for student F and M visas.
I-20 Template	SEV_I20_TEMPLATE	Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, I-20 Template	Set up default information to include in I-20 forms for student F and M visas.

Setting Up SEVIS School Codes

Access the School Code Table page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table).



School Code Table page

School Information

Enter information here to match the information that you record in the DHS SEVIS RTI for your school certification. The data that you enter is for internal purposes and appears in display-only mode on the I-20 form pages.

School Code Description

Enter the description for the school code entered.

Address 1, City, State

Enter the address for the school code entered.

School Official (name)

Enter the contact school official.

Title

Enter the title of the person named as school official.

Approval Date

Enter the date on which the institution's certification was granted.

PDSO/DSO

ID

Enter the ID number of the primary designated school official (PDSO) or the DSO named.

The available values include only IDs for the DSO or PDSO SEVIS user IDs that exist in the External System ID table.

Note. Each designated school official's SEVIS user ID information must be set up in the External System ID table to populate the ID fields here. When setting up the SEVIS user ID information in the External System ID table, use *DSO/PDSO SEVIS User ID* as the external system type. You typically identify the primary and other DSOs when completing the I-17 certification process. Obtain the primary DSO and other DSO SEVIS user ID information from the DHS.

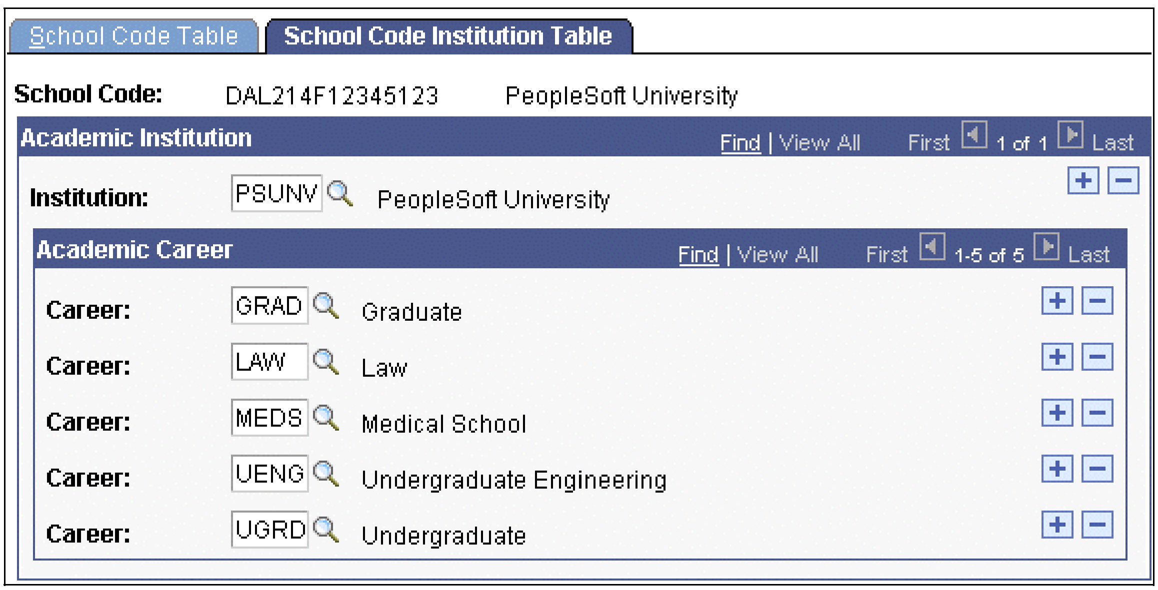
Title — Enter the title of the primary designated school official or the designated officer named.

Primary DSO (primary designated school official) — Select to indicate that this is the primary designated school official.

You must select one person as the primary DSO or you cannot save the information on this page.

Defining the Institution for a School Code

Access the School Code Institution Table page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, School Code Table, School Code Institution Table).



School Code Institution Table page

Warning! You must enter all institutions and careers affiliated with each school code. If you do not enter all of the institutions and careers affiliated with each school code, academic information is not reported to SEVIS.

Academic Institution

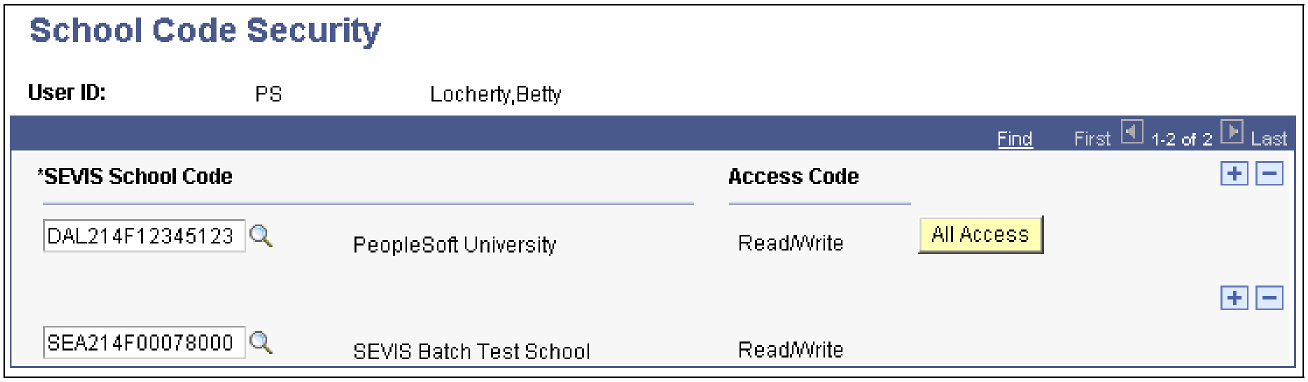
Academic Institution — Select each institution that is affiliated with the school code.

Academic Career

Career Select each career that is affiliated with the institution and school code.

Setting Up SEVIS School Code Security

Access the School Code Security page (Set Up SACR, Security, Secure Student Administration, User ID, SEVIS, School Code Security).



School Code Security page

The SEVIS school code secures many of the F and M visa pages in PeopleSoft's SEVIS component.

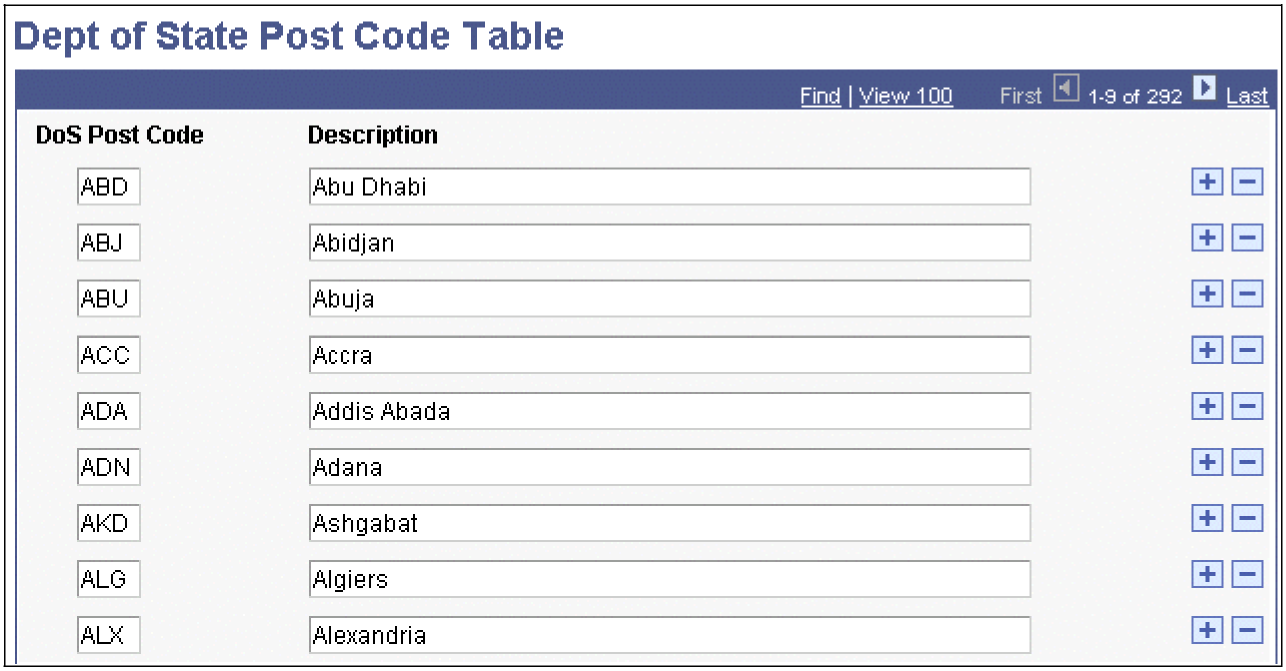
SEVIS School Code Select the SEVIS school codes to which this user should have access.

Access Code The access code is set to *Read/Write.* You cannot change this.

All Access Click to assign this ID access to all SEVIS school codes.

Setting Up U.S. Department of State Postal Codes

Access the Dept of State Post Code Table page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Dept of State Post Code Table).



Dept of State Post Code Table page

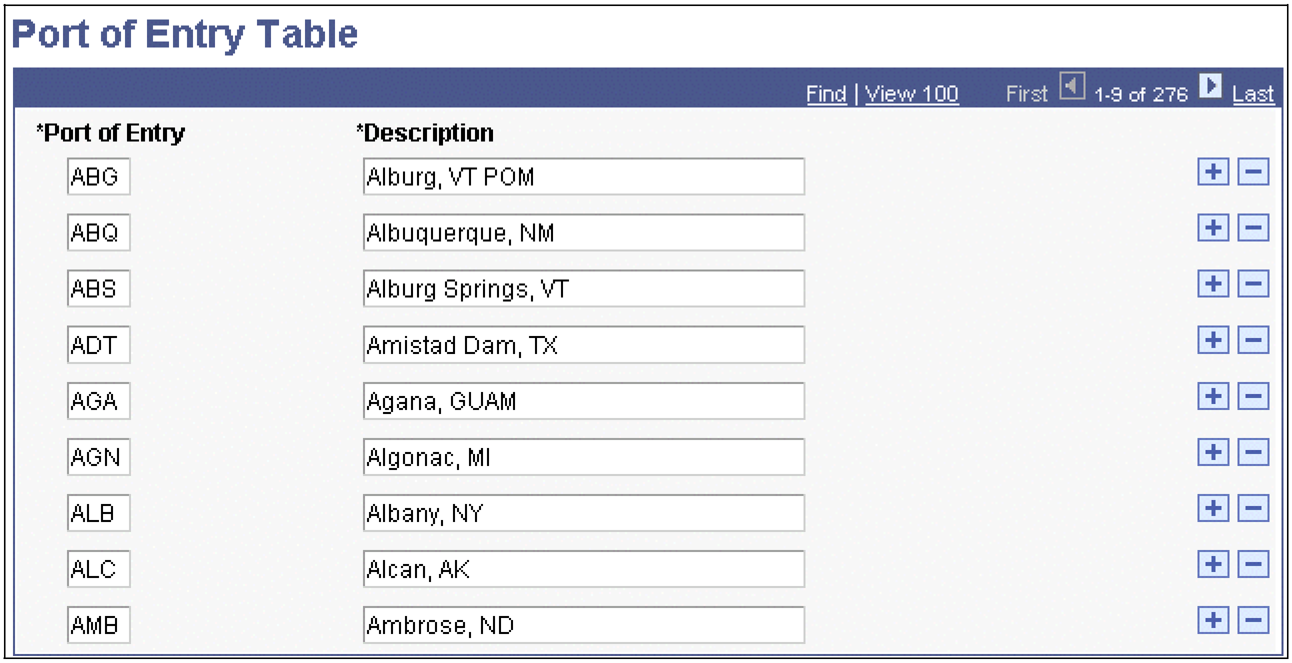
Note. The DHS defines the Dept of State (DoS) postal code values in the lookup tables section of *Application Program Interface (API).* The DHS may update the DoS post codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

DoS Post Code (Department of State postal code)	Enter the country code established by the U.S. Department of State for a particular country.
Description	Enter the full name of the country.

Setting Up Port of Entry Data

Access the Port of Entry Table page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Port of Entry Table).



Port of Entry Table page

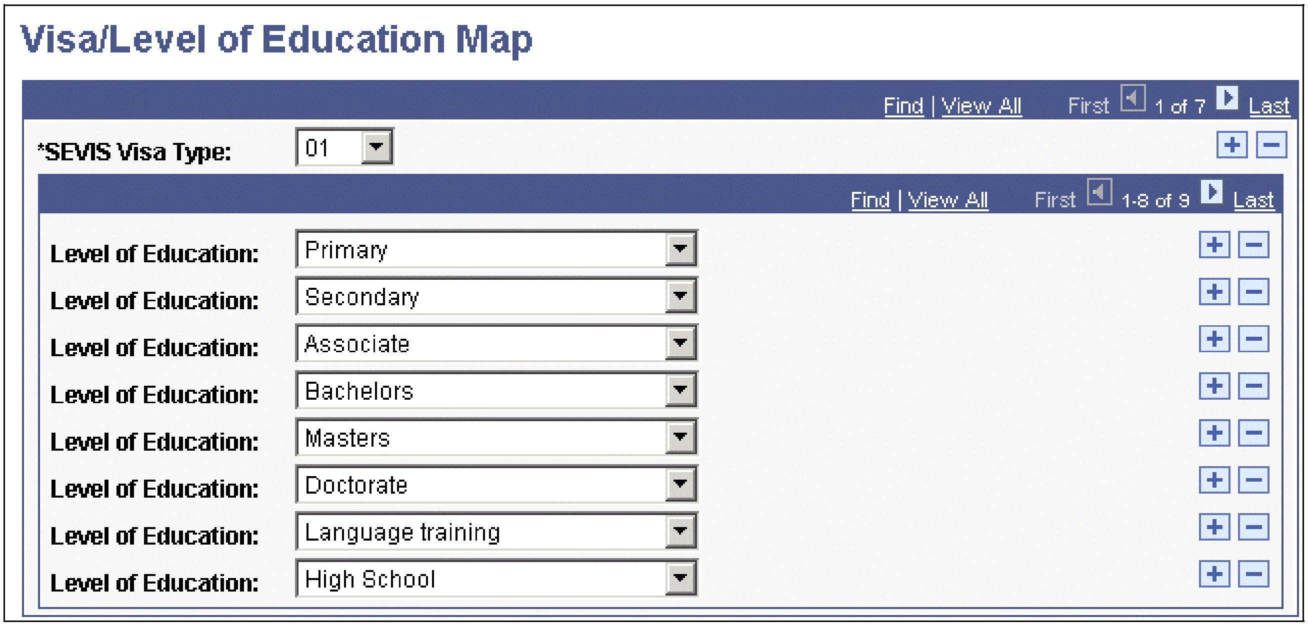
Note. The DHS defines the port of entry values in the lookup tables section of *Application Program Interface (API).* The DHS may update the port of entry codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Port of Entry	Enter the port of entry code for a particular port of entry into the United States.
Description	Enter the full name of the U.S. port of entry.

Mapping SEVIS Visa Types to Levels of Education

Access the Visa/Level of Education Map page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Visa/Level of Education Map).



Visa/Level of Education Map page

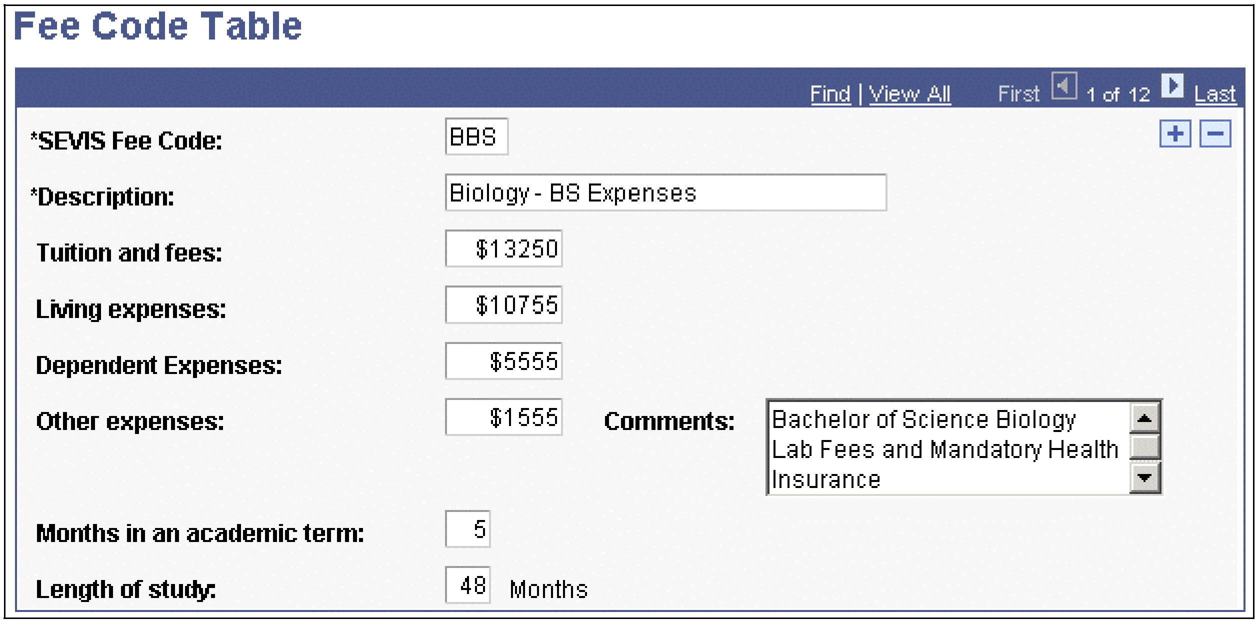
The mapping that you set up on this page affects the values available in the Level of Education field on the I-20 form.

Warning! Do *not* change or delete the level of education mapping. Doing so affects the I-20 processing.

SEVIS Visa Type	Select the appropriate SEVIS visa type based on the DHS lookup tables.
Level of Education	Select the values that are allowed for the indicated classification.

Setting Up SEVIS Fee Codes

Access the Fee Code Table page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, Fee Code Table).



Fee Code Table page

Data on this page is used on the F and M visas I-20 Template page and serves as default values for populating the I-20 Form page.

Note. To take full advantage of I-20 default value functionality, you might consider how fees and length of study vary by program and set different defaults for different programs.

SEVIS Fee Code Enter the fee code for the program.

Description Enter the full name of the fee code.

Tuition and fees, Living expenses, Expenses of dependents, and **Other expenses** Enter amounts for each of these expenses.

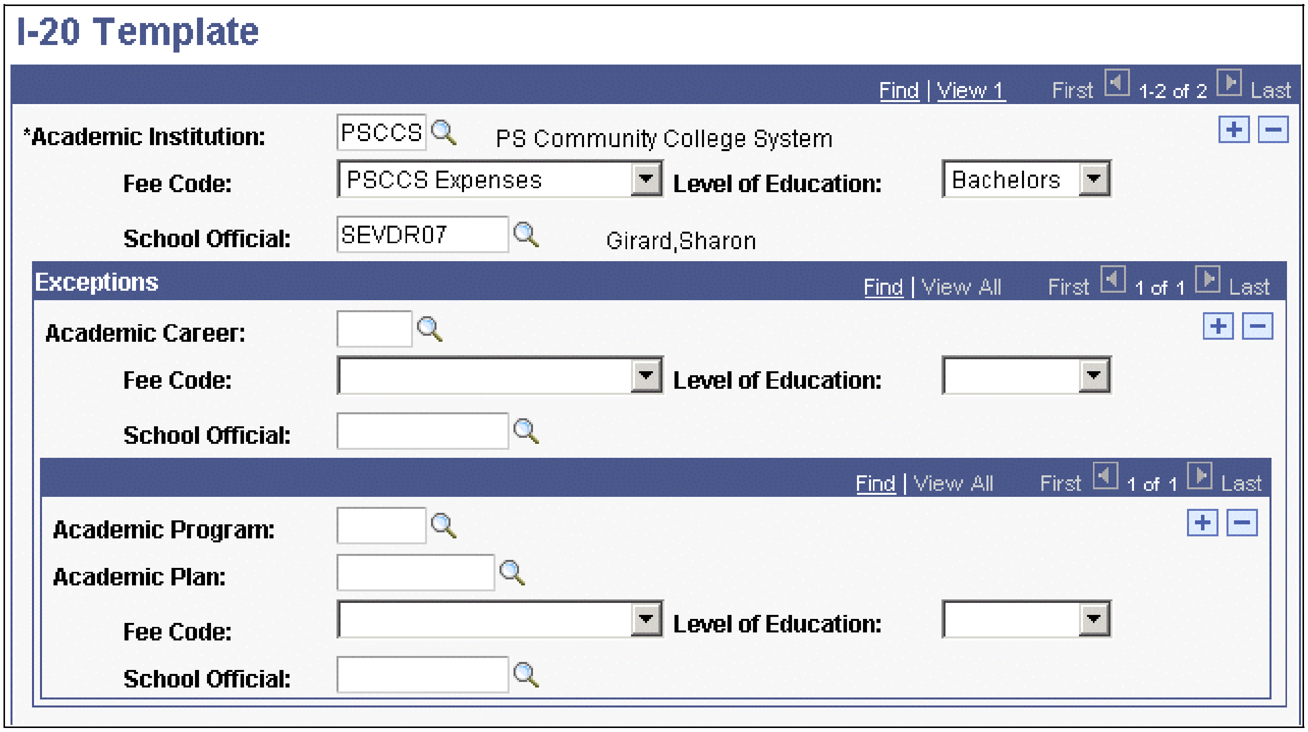
Comments Add comments to describe the other expenses, if any.

Months in an academic term Enter the number of months in an academic term associated with these expenses.

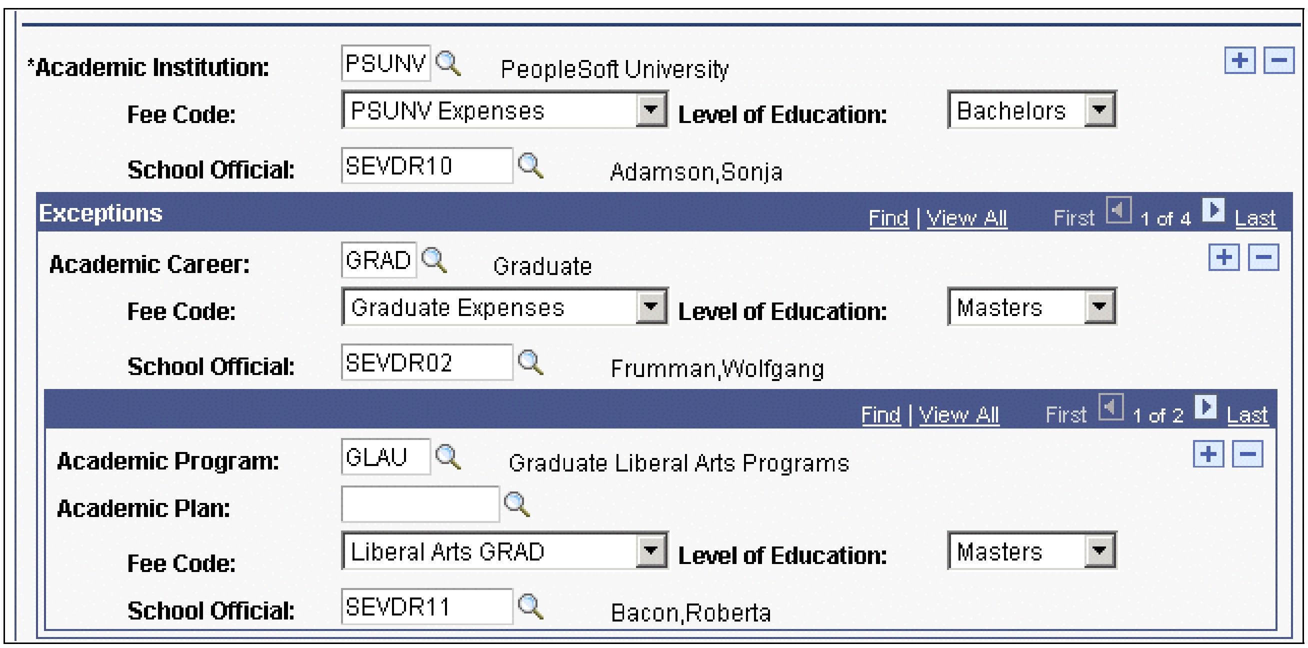
Length of study Enter the number of months for the program associated with these expenses.

Creating an I-20 Form Template

Access the I-20 Template page (Set Up SACR, Product Related, Campus Community, SEVIS, F/M Visa, I-20 Template).



I-20 Template page (1 of 2)



I-20 Template page (2 of 2)

The I-20 template enables you to define general defaults and to specify exceptions for career and academic programs and plan levels. Values on the template serve as defaults for the School Estimates and the Designated School Official sections of the I-20 form.

The fee code values come from the Fee Code Table page. You must enter the appropriate values for the Level of Education and School Official fields.

Setting Up J Visas Processing

To set up J visas processing, use the following components: SEVIS Program Sponsor Table (SEV_PRG_SP_TBL), International Organizational Table (SEV_INT_ORG_TBL), Position Code Table (SEV_POS_CD_TBL), Site of Activity Table (SEV_SITE_ACT_TBL), US Government Agency Code (SEV_AGEN_CD_TBL), and J Visa Termination Reasons (SEV_EV_TERM_RSN).

For exchange visitor J visas, this section discusses how to:

- Set up program sponsors.
- Set up site of activity codes.
- Define the default site of activity.
- Set up program sponsor security.
- Set up international organization codes.
- Set up U.S. government agency codes.
- Set up position codes.
- Set up J visa termination reasons.

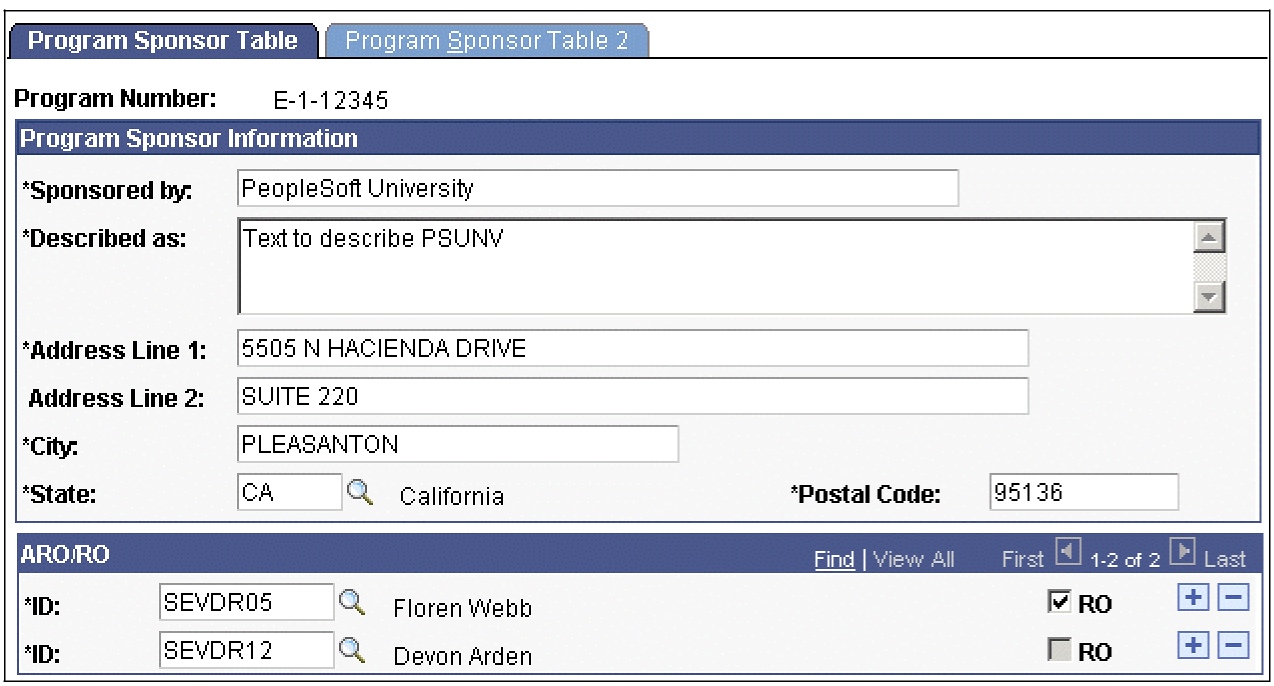
Pages Used to Set Up J Visas Processing

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Sponsor Table	SEV_PRG_SP_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table	Set up program sponsor and responsible officer information for exchange visitor J visas.
Site of Activity Table	SEV_SITE_ACT_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Site of Activity Table	Set up site of activity codes to use on the J visas DS-2019 form.
Program Sponsor Table 2	SEV_PRG_SP2_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table, Program Sponsor Table 2	Set up academic institution and academic career information for exchange visitor J visas. Specify the default site of activity.
SEVIS Program Sponsor Security	SEV_PRG_SP_SCTY	Set Up SACR, Security, Secure Student Administration, User ID, SEVIS Pgm Sponsor Security	Set J visa program sponsor security access for an individual.

Page Name	Definition Name	Navigation	Usage
International Organizations	SEV_INT_ORG_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, International Orgs Table	Reference the international organization information to use on the J visas DS-2019 form.
US Government Agency Codes	SEV_AGEN_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, US Government Agency Code Tbl	Reference the U.S. government agency information to use on the J visas DS-2019 form.
Position Code Table	SEV_POS_CD_TBL	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Position Code Table	Reference the position codes to use on the J visas DS-2019 form.
J Visa Termination Reasons	SEV_EV_TERM_RSN	Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, J Visa Termination Reasons	Set termination reasons to use for J visas termination exchange visitor events.

Setting Up Program Sponsors

Access the Program Sponsor Table page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table).



Program Sponsor Table page

Program Sponsor Information

Enter information here to match the information that you record in the DHS SEVIS RTI for your program sponsor certification. The data that you enter is for internal purposes and appears in display-only mode on the DS-2019 form pages.

Sponsored by — Enter the name of the program sponsor.

Described as — Enter the description for the program sponsor.

Address Line 1, Address Line 2, City, State, and **Postal Code** — Enter the address for the program sponsor.

The system uses this address as the U.S. address of the exchange visitor for the Create EV event if the exchange visitor does not provide a U.S. address.

ARO/RO

ID — Enter the ID number of the responsible officer (RO) or the alternate responsible officer (ARO) named.

The available values include only IDs for the RO or ARO SEVIS user IDs that exist in the External System ID table.

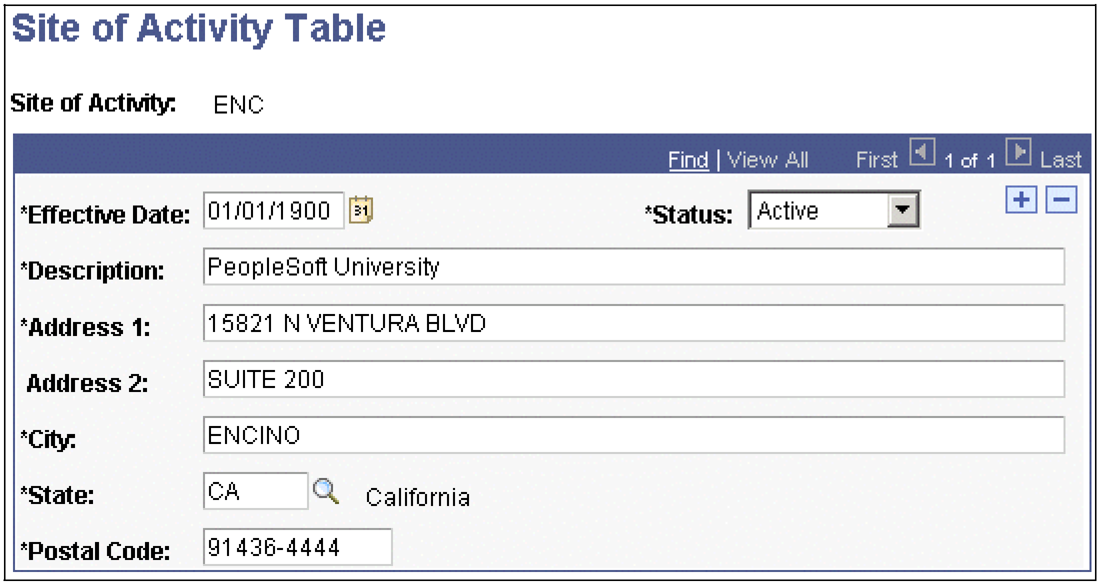
Note. Each responsible officer's SEVIS user ID information must be set up on the External System ID table to populate the ID fields here. When setting up the SEVIS user ID information on the External System ID table, use *RO/ARO SEVIS User ID* as the external system type. You typically identify your RO and AROs when completing the DS-3036 certification process. Obtain your RO and ARO SEVIS user ID information from DHS.

RO (responsible officer) — Select to indicate that this person is the responsible officer.

You must select one person as the RO or you cannot save the information on this page.

Setting Up Site of Activity Codes

Access the Site of Activity Table page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Site of Activity Table).



Site of Activity Table page

Status

Select *Active* or *Inactive.*

The system displays only active site of activity rows in the prompt on the DS-2019 Form and SEVIS Program Sponsor pages.

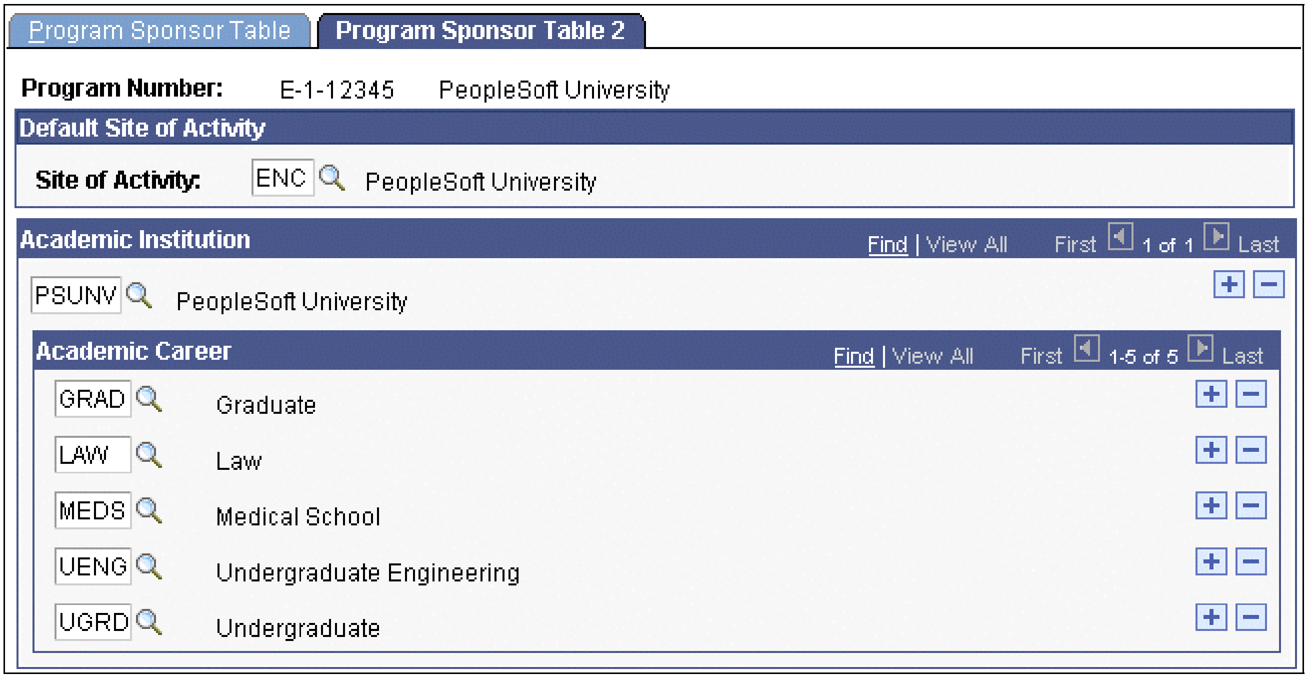
Description

Enter the site of activity name.

Warning! This description is submitted to SEVIS as the SiteName. Changing this field will trigger a Site of Activity – Edit event for all exchange visitors with this site of activity assigned.

Defining the Default Site of Activity

Access the Program Sponsor Table 2 page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, SEVIS Program Sponsor Table, Program Sponsor Table 2).



Program Sponsor Table 2 page

Warning! You must enter all institutions and careers affiliated with each program sponsor that accepts student category exchange visitors. If you do not enter all of the institutions and careers affiliated with each program sponsor, academic information is not reported to SEVIS for student category exchange visitors.

Default Site of Activity

Site of Activity	Select the site of activity to use as the default value when adding a new DS-2019 form.

Academic Institution

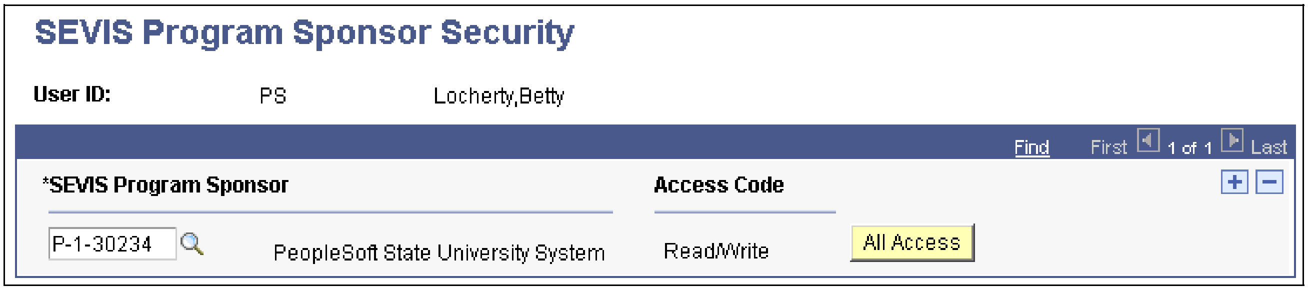
Academic Institution	Select each institution that is affiliated with the program sponsor.

Academic Career

Academic Career	Select each career that is affiliated with the institution and program sponsor.

Setting Up Program Sponsor Security

Access the SEVIS Program Sponsor Security page (Set Up SACR, Security, Secure Student Administration, User ID, SEVIS Pgm Sponsor Security).



SEVIS Program Sponsor Security page

The SEVIS program sponsor code secures many of the J visa pages in the SEVIS component.

SEVIS Program Sponsor Select each SEVIS program sponsor to which this user should have access.

Access Code The access code is set to *Read/Write.* You cannot change this.

All Access Click to assign this ID access to all SEVIS program sponsors.

Setting Up International Organization Codes

Access the International Organizations page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, International Orgs Table).

International Organizations page

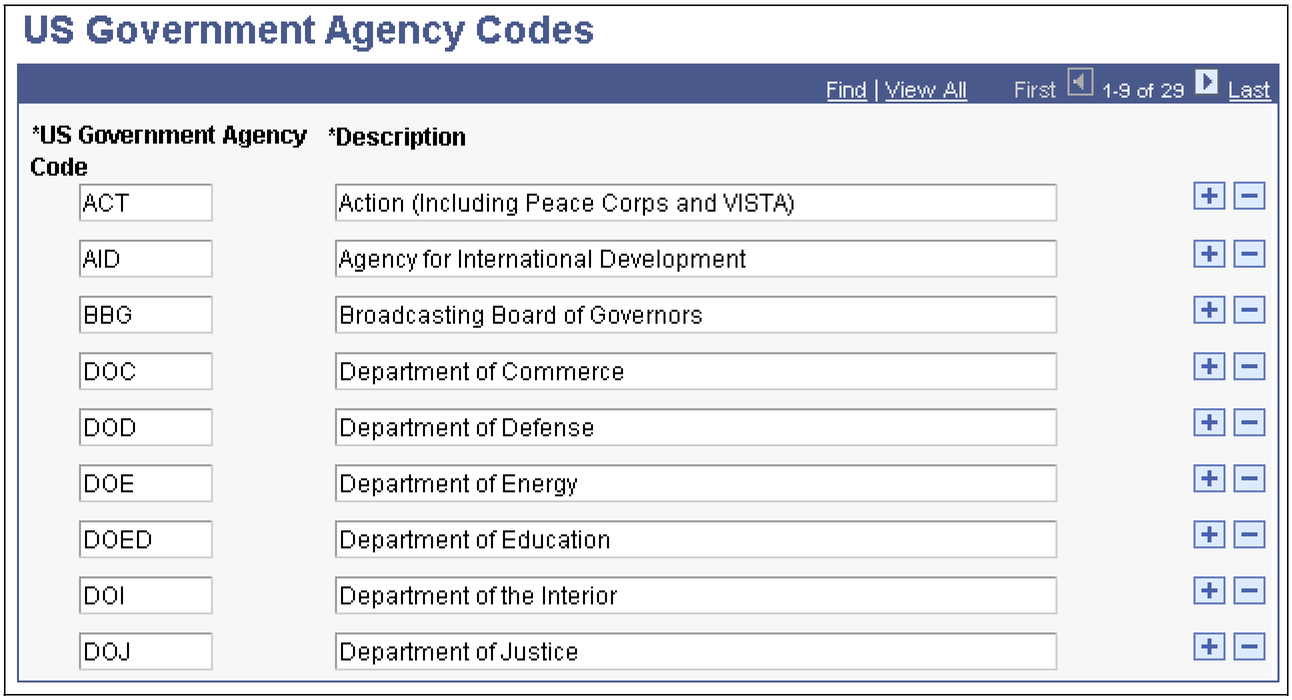
Note. The DHS defines the U.S. Government agency codes that are delivered in the Lookup Tables section of *Application Program Interface (API).* The DHS may update the international organization codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Intl Organization Code (international organization code)	Enter the DHS code for the international organization that provides funding for exchange visitors.
Description	Enter the full name of the DHS international organization.

Setting Up U.S. Government Agency Codes

Access the US Government Agency Codes page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, US Government Agency Code Tbl).



US Government Agency Codes page

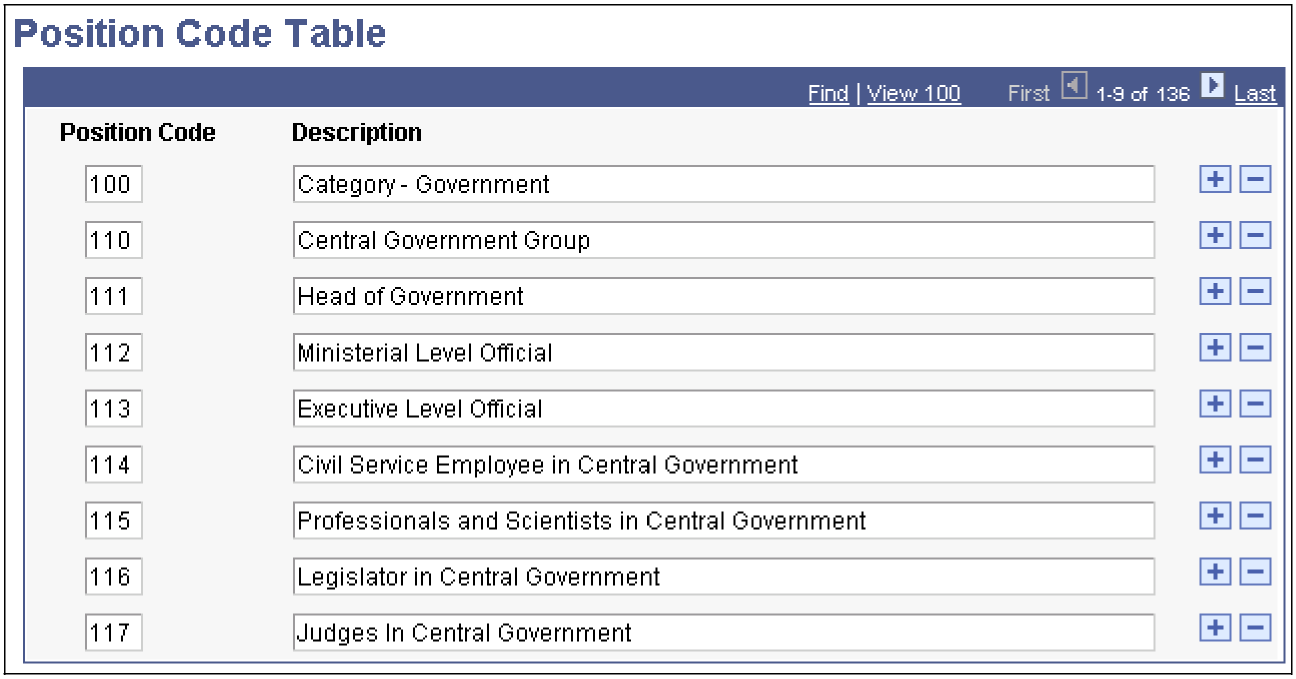
Note. The DHS defines the Position Codes that are delivered in the Lookup Tables section of *Application Program Interface (API).* The DHS may update the agency codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

US Government Agency Code	Enter the DHS code for the U.S. government agency that provides funding for exchange visitors.
Description	Enter the full name of the DHS U.S. government agency.

Setting Up Position Codes

Access the Position Code Table page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, Position Code Table).



Position Code Table page

Note. The DHS defines the position codes that are delivered in the Lookup Tables section of *Application Program Interface (API).* The DHS may update the position codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Position Code	Enter the DHS code for a position that exchange visitors may hold in their home country. This is reported on the DS-2019 form.
Description	Enter the full name of the DHS position.

Setting Up J Visa Termination Reasons

Access the J Visa Termination Reasons page (Set Up SACR, Product Related, Campus Community, SEVIS, J Visa, J Visa Termination Reasons).


J Visa Termination Reasons

Find | View All First 1-10 of 11 Last

Termination Reason	Description
CONVIC	Conviction of a crime
DISCIP	Disciplinary action
ENGEMP	Engaging in unauthorized employment
FALACT	Failure to pursue EV program activities
FALADD	Failure to submit change of current address within 10 days
FALINS	Failure to maintain health insurance
FALSTD	Failure to maintain a full course of study
INVSUS	Involuntary suspension
OTHER	Other
VIOEXV	Violating exchange visitor program regulations

J Visa Termination Reasons page

Note. The DHS defines the termination reason codes that are delivered in the Lookup Tables section of *Application Program Interface (API).* The DHS may update these codes from time to time. You must update or delete codes and descriptions to keep your system current with SEVIS.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Termination Reason Enter the DHS code for the exchange visitor termination reason.

The SEVIS Alerts process for J visas uses the termination reasons when populating a Terminate EV event.

Description Enter the full name of the DHS exchange visitor termination reason.

Setting User Defaults for Visa Processing

To set user defaults for visa processing, use the User Defaults component (OPR_DEFAULT_CS).

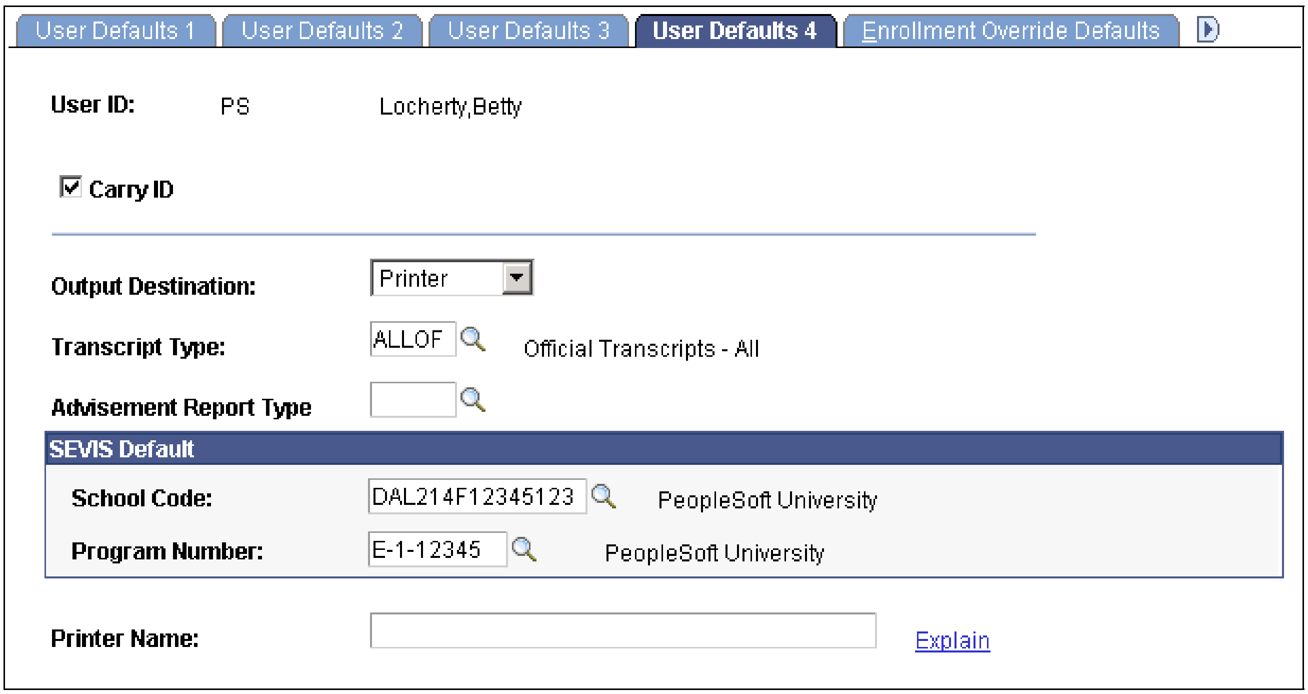
This section discusses how to set up school code or program sponsor user defaults for an individual.

Page Used for Setting User Defaults Visa Processing

Page Name	*Definition Name*	*Navigation*	*Usage*
User Defaults 4	OPR_DEF_TABLE_CS4	Set Up SACR, User Defaults, User Defaults 4	Set up user defaults for visa processing, set up default school codes for F and M visa processing, and set up a default program sponsor for J visa processing.

Setting School Code or Program Sponsor User Defaults

Access the User Defaults 4 page (Set Up SACR, User Defaults, User Defaults 4).



User Defaults 4 page

Note. The *Carry ID*,*Output Destination*,*Transcript Type*, and *Advisement Report Type* fields are not used for SEVIS.

SEVIS Default

The system uses the defaults that you set here to populate data in the SEVIS component. The default values that you set here can be overridden on any page in the system.

Although setting user defaults can save time, doing so is optional.

School Code	*(For F/M visas)* Enter the default DHS SEVIS school code that you want the system to use for this ID. Default school codes are used to populate data in the SEVIS components for F/M visa processing.
Program Number	*(For J visas)* Enter the default DHS SEVIS exchange visitor program sponsor number that you want the system to use for this ID. Default program numbers are used to populate data in the SEVIS components for J visa processing.

Chapter 10

Setting Up Service Indicators

This chapter provides an overview of setting up service indicators and discusses how to:

- Set up service impacts.
- Set up service indicator codes and reasons.
- View service indicators for third-party integration data.

Understanding Service Indicator Setup

Service indicators consist of service impacts and service indicator reasons that make each service indicator unique.

You complete these steps to set up service indicators:

1. Define service impact values on the Service Impact Table page.
2. Define service indicator codes (including attaching service impact values to each service indicator) on the Service Indicator Codes page.
3. Define service indicator reason codes for each service indicator on the Service Indicator Reasons page.

Setting Up Service Impacts

To set up service impacts, use the Service Impact Table component (SERVICE_TABLE).

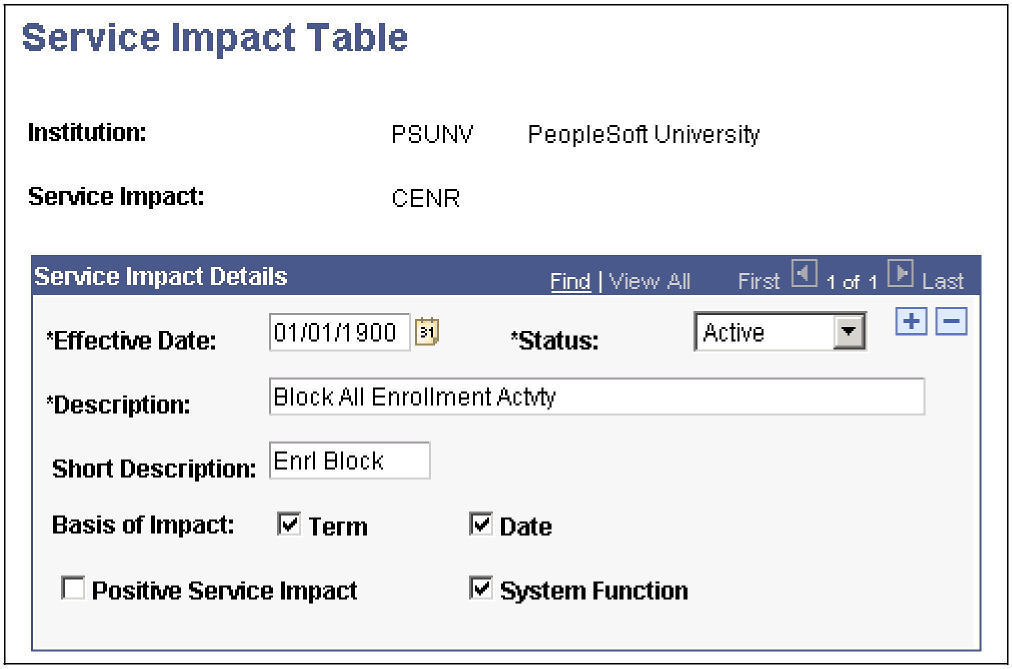
This section discusses how to define service impact codes.

Page Used to Set Up Service Impacts

Page Name	***Definition Name***	***Navigation***	***Usage***
Service Impact Table	SRVC_IMPACT_TABLE	Set Up SACR, Common Definitions, Service Indicators, Service Impact Table	Define service impact codes to attach to service indicators.

Defining Service Impact Codes

Access the Service Impact Table page (Set Up SACR, Common Definitions, Service Indicators, Service Impact Table).



Service Impact Table page

To use the PeopleSoft-delivered services that are related to service impacts (such as blocking enrollment), you must set up but never modify the following service impact codes for every institution in your system:

- AENR
- CENR
- ENVER
- IENR

Each of these service impacts is used in a unique way within the system.

Service Impact Details

A service indicator is in effect for as long as its longest service impact. A service impact is in effect from the start date (for date-based business processes, such as requesting a transcript) or start term (for term-based business processes, such as financial aid disbursement). It remains in effect up to and including the end date or through the end term. If no end point is defined, the service indicator with that impact remains in effect until it is released manually.

Basis of Impact

Select the basis by which the system is to disregard this service impact.

The Service Indicator remains on the record until you remove it; however, the system will disregard the impact as of the end of the basis of impact that is selected. Each impact must have a basis of impact.

If the business process is term-based, select the *Term* check box for the system to disregard the impact automatically upon completion of the End Term. The end term is defined on the Add Service Indicator page, which is where you assign the service indicator to an ID.

If the business process is date-based, select the *Date* check box for the system to disregard the impact automatically upon completion of the End Date. The end date is defined on the Add Service Indicator page, which is where you assign the service indicator to an ID.

If the business process is both term-based and date-based, you can select both check boxes. For example, you might need to restrict enrollment activities for an individual for Fall Term 006 but only once the Drops period has begun, which is two weeks into the term. The Service Indicator code with the appropriate impact is assigned with a Start Term value of *Fall Term 006,* an End Term value of *Fall Term 006,* and a Start Date of *October 6.* Selecting both check boxes would allow this impact to restrict enrollment activities only on or after October 6 and only for Fall Term 006.

Positive Service Impact

Select this check box to indicate that the impact provides a service, as opposed to denying or restricting one.

System Function

Select this check box to identify the service impact as one called by PeopleSoft program logic. For example, you must define the *CENR* service impact and select this check box for it, for each institution in your system, because it is used by enrollment process logic.

Setting Up Service Indicator Codes and Reasons

To set up service indicator codes and reasons, use the Service Indicator Table component (SERVICE_IND_CD_TBL).

This section discusses how to: create service indicator codes and reasons.

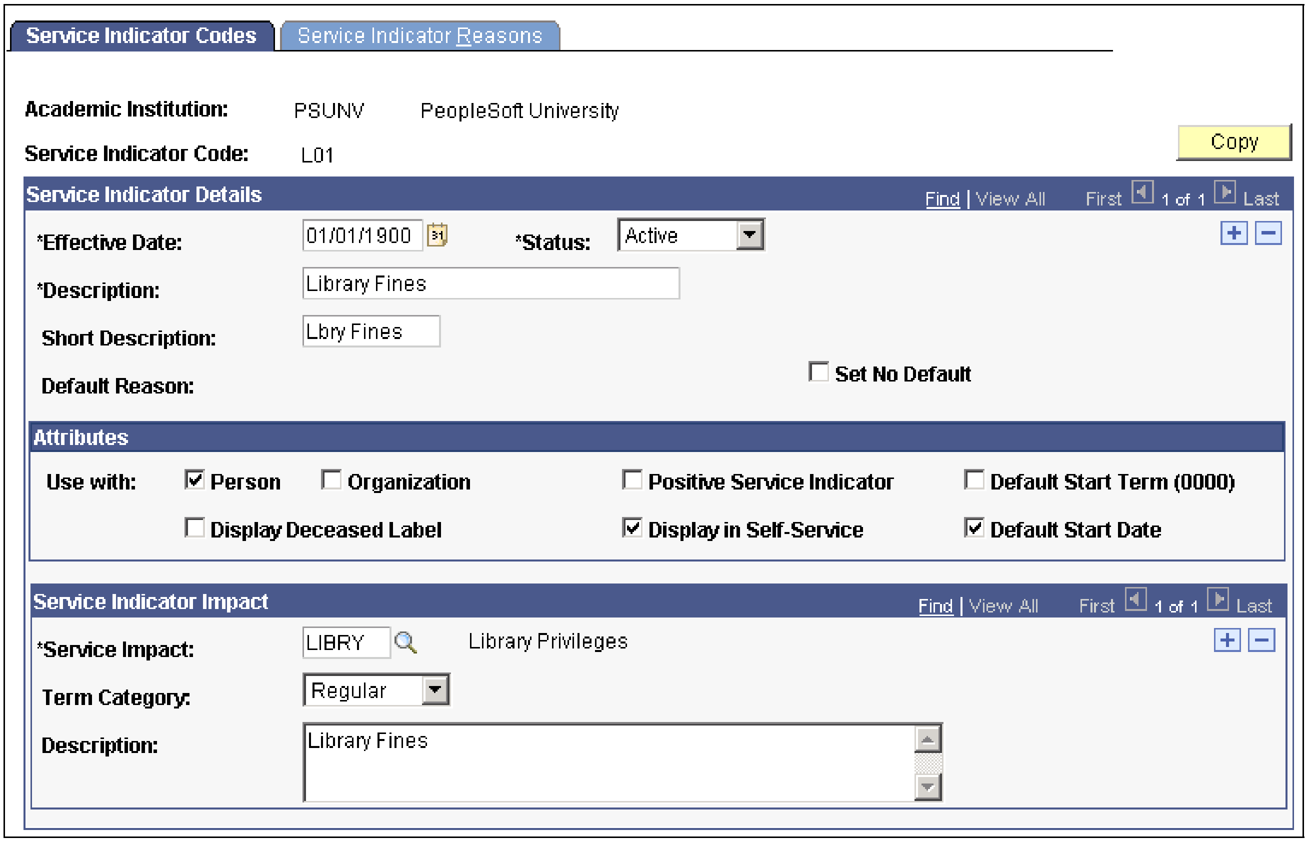
- Create service indicator codes.
- Define and associate service indicator reasons.

Pages Used to Set Up Service Indicator Codes and Reasons

Page Name	***Definition Name***	***Navigation***	***Usage***
Service Indicator Codes	SRVC_IND_CD_TABLE	Set Up SACR, Common Definitions, Service Indicators, Service Indicator Codes	Create service indicator codes for positive and negative service indicators.
Service Indicator Reasons	SRVC_IND_RSN_TABLE	Set Up SACR, Common Definitions, Service Indicators, Service Indicator Codes, Service Indicator Reasons	Define and associate reasons for a service indicator.
Service Indicator Display	SCC_SI_DISP_ROLE	Click the Secure Display by Role link on the Service Indicator Reasons page.	Select roles permitting users with those roles to view the assigned service indicator.

Creating Service Indicator Codes

Access the Service Indicator Codes page (Set Up SACR, Common Definitions, Service Indicators, Service Indicator Codes).



Service Indicator Codes page

Note. Assigned serviced indicators draw on the current effective-dated service indicator definition. If a new effective-dated row is added to the service indicator definition, the changes in that row will affect existing as well as new assignments to IDs.

Copy

Click to copy this service indicator definition, including associated service indicator impacts and service indicator reasons, to a new institution, a new service indicator code within the currently defined institution, or a new institution and code combination.

Service Indicator Details

Default Reason

Displays the default reason associated with the service indicator.

Note. The system cannot display the default reason until the reason is defined and associated with the service indicator on the Service Indicator Reasons page.

Set No Default

Select this check box to prevent the system from displaying default values in the Service Indicator Reason Code and Department fields on the Service Indicators page.

Attributes

Person and **Organization**

Specify the type of IDs to which this service indicator can be assigned.

Select the *Person* check box to allow assignment to individuals.

Select the *Organization* check box to allow assignment to organizations.

Select both check boxes to allow assignment to both individuals and organizations.

Display Deceased Label

Select this check box to display the word *DECEASED* at the top of pages about individuals to whom the indicator is assigned in the future.

Warning! Select the Display Deceased Label check box *only* when creating a death service indicator. Selecting this for any other service indicator could cause the system to apply the deceased label to individuals who are not deceased. If this happens, substantial manual effort might be required to remove the deceased designation from each individual's record.

Positive Service Indicator

Select this check box to indicate that the service indicator identifies a privilege or service to be provided.

For example, if you define a positive service indicator of *Conference Guest* and associate the service impact of *Front of Line*, then any person assigned the Conference Guest service indicator should receive front-of-line service at your institution.

Display in Self-Service

If your institution has licensed PeopleSoft Campus Self Service, you can select this check box to cause the service indicator to appear on self-service pages.

Default Start Term (0000)

Select this check box to set the Start Term to *0000* (Begin Service Indicator Term) when this service indicator is assigned.

Default Start Date

Select this check box to set the Start Date to *<today's date>* (current system date) when this service indicator is assigned.

Service Indicator Impact

Service Impact

Enter the service that is either restricted or provided by this service indicator.

Term Category

Select the single term category for which the service impact is valid.

Note. This value is provided for informational purposes for consideration by administrative users. Delivered processes do not consider term categories.

If you do not specify a term category, the service impact should be considered valid for all terms defined for the service indicator with which it is associated.

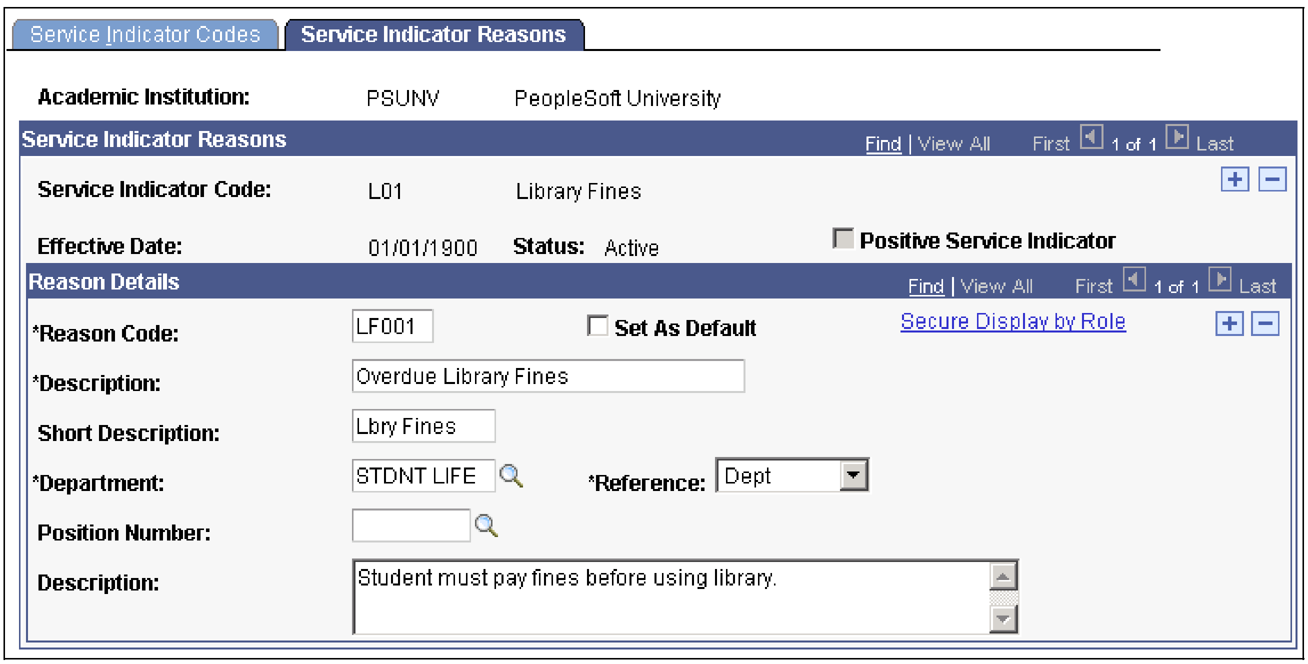
Values for this field are delivered with your system as translate values. You can modify these translate values.

Description

Enter comments to further describe or identify the service impact as it relates to this service indicator.

Defining and Associating Service Indicator Reasons

Access the Service Indicator Reasons page (Set Up SACR, Common Definitions, Service Indicators, Service Indicator Codes, Service Indicator Reasons).



Service Indicator Reasons page

Service Indicator Reasons

Positive Service Indicator

If the service indicator identifies a privilege or service to be provided (as opposed to denied or restricted), the system displays this check box as selected.

Reason Details

Reason Code	Enter a code for the service indicator reason that you are creating.
Set As Default	Select this check box to associate this reason with the service indicator. You can select only one default reason for each service indicator. When you save the page, the system displays this reason next to the Default Reason field label on the Service Indicators Codes page. When you assign the service indicator on the Service Indicator Data 1 page, the system displays this reason as the default reason unless the Set No Default check box next to the Default Reason field on the Service Indicators Codes page is selected. In this case, no default reason appears.
Secure Display by Role	Click to access the Service Indicator Display page, where you can select roles to permit only users with those roles to view the assigned service indicator. Users without one of the specified roles are not able to view the assigned service indicator whether accessing the page through the icon or through the administrative menus.
Department	Enter the department at your institution that is responsible for this service indicator.
Reference	Select the type of entity that identified the need for this service indicator. Values are *Department, Department and Instructor,* and *Department Bill # and Instructions.* Values for this field are delivered with your system as translate values. You can modify these translate values.
Position Number	Enter the ID of the person or office that identified the need for this service impact.
Description	Enter comments or instructions to further describe or define this service indicator reason, or to identify what an individual must do to qualify for the removal of a negative service indicator. The text that you enter here appears as the instructions for this hold on the Holds page in PeopleSoft Campus Self Service.

Viewing Service Indicators for Third-Party Integration Data

This section discusses how to view service indicator data for a third-party vendor integration.

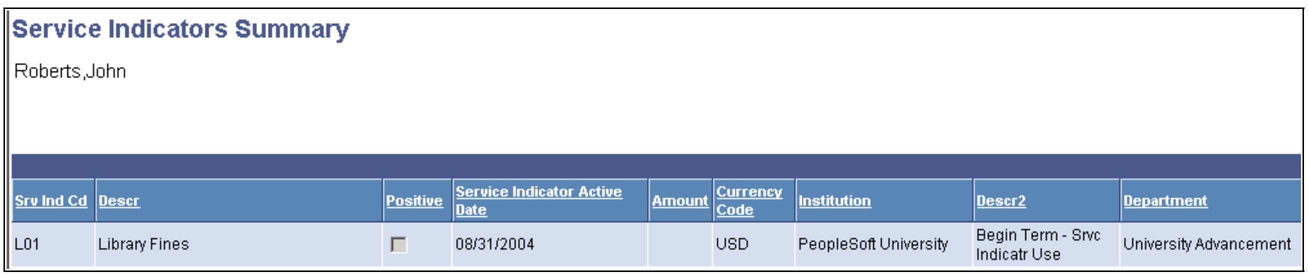
Page Used to View Service Indicators for Third-Party Integration Data

Page Name	Definition Name	Navigation	Usage
Service Indicator Summary	CC_SRVCIND_ALL	Set Up SACR, Install, CS Integration Points, CC Interface, Service Indicators	Enter or review data communicated by the Service Indicator component interface to an external vendor or other integrating application.

Viewing Service Indicator Data for a Third-Party Integration

Access the Service Indicators Summary page (click the Secure Display by Role link on the Service Indicator Reasons page)

.



Service Indicators Summary

Roberts,John

Srv Ind Cd	Descr	Positive	Service Indicator Active Date	Amount	Currency Code	Institution	Descr2	Department
L01	Library Fines		08/31/2004		USD	PeopleSoft University	Begin Term - Srvc Indicatr Use	University Advancement

Service Indicators Summary page

View the service indicator data that is set to communicate to a specific third-party, such as an integration application or IVR (Interactive Voice Response) vendor.

Chapter 11

Setting Up FERPA Privacy Control

The FERPA privacy control functionality is named for the U.S. Family Educational Rights and Privacy Act regulation. However, anyone can use the functionality to set privacy controls in PeopleSoft Campus Solutions.

This section provides an overview of FERPA privacy control and discusses how to:

- Make data available for FERPA privacy control.
- Make publications available for privacy exceptions.

Understanding FERPA Privacy Control

To comply with FERPA, you must, at minimum, make directory information available for privacy control. You must review the FERPA_VW records in your system and configure them to reflect the type of information that your institution uses as directory information.

The fields shipped on each FERPA_VW record that is delivered with your system, are examples of that type of directory information.

Note. No examples are shipped for the extracurricular activities view record (ACTVTS_FERPA_VW).

If the shipped examples do not reflect your institution's directory information, you should modify the relevant FERPA_VW records and other objects to adjust the data accordingly.

You can specify additional fields on existing FERPA_VW records to include more information within the same FERPA-controlled category (address, names, personal information, and so on).

You can also use PeopleSoft Application Designer (see your PeopleTools documentation) to do the following:

Create and add new FERPA_VW records to add new categories to your system's FERPA control. You must create a FERPA_VW record for each new category and modify the following to accommodate the new record:

- Records whose names start with FERPA.
- Views whose names end with FERPA_VW.

- PeopleCode attached to FERPA pages, including:
    - DERIVED_CS.FERPA_FLAG.FCH
    - DERIVED_CS.FERPA_PB.FCH
    - FUNCLIB_CS.FERPA_FLAG.FFO
    - PERSONAL_DATA.FERPA.RIN

Remove a field from the FERPA pages. You must also modify the view text on the appropriate pages.

- Use a SQL query tool or write an SQR program to remove all occurrences of the value from the field on the FERPA_OVERRIDE data (DELETE FROM PS_FERPA_OVERRIDE WHERE FIELDNAME='SEX').
- Remove the field from all other FERPA-related pages.
- Use Application Designer to remove the value from FERPA control.

Warning! Removing name, address, phone, and email fields from FERPA views will affect the directory listings in PeopleSoft Campus Self Service Community Directory. You might need to modify the directory load process.

Making Data Available for FERPA Privacy Control

To set up FERPA control, use the FERPA Control component (FERPA_CONTROL).

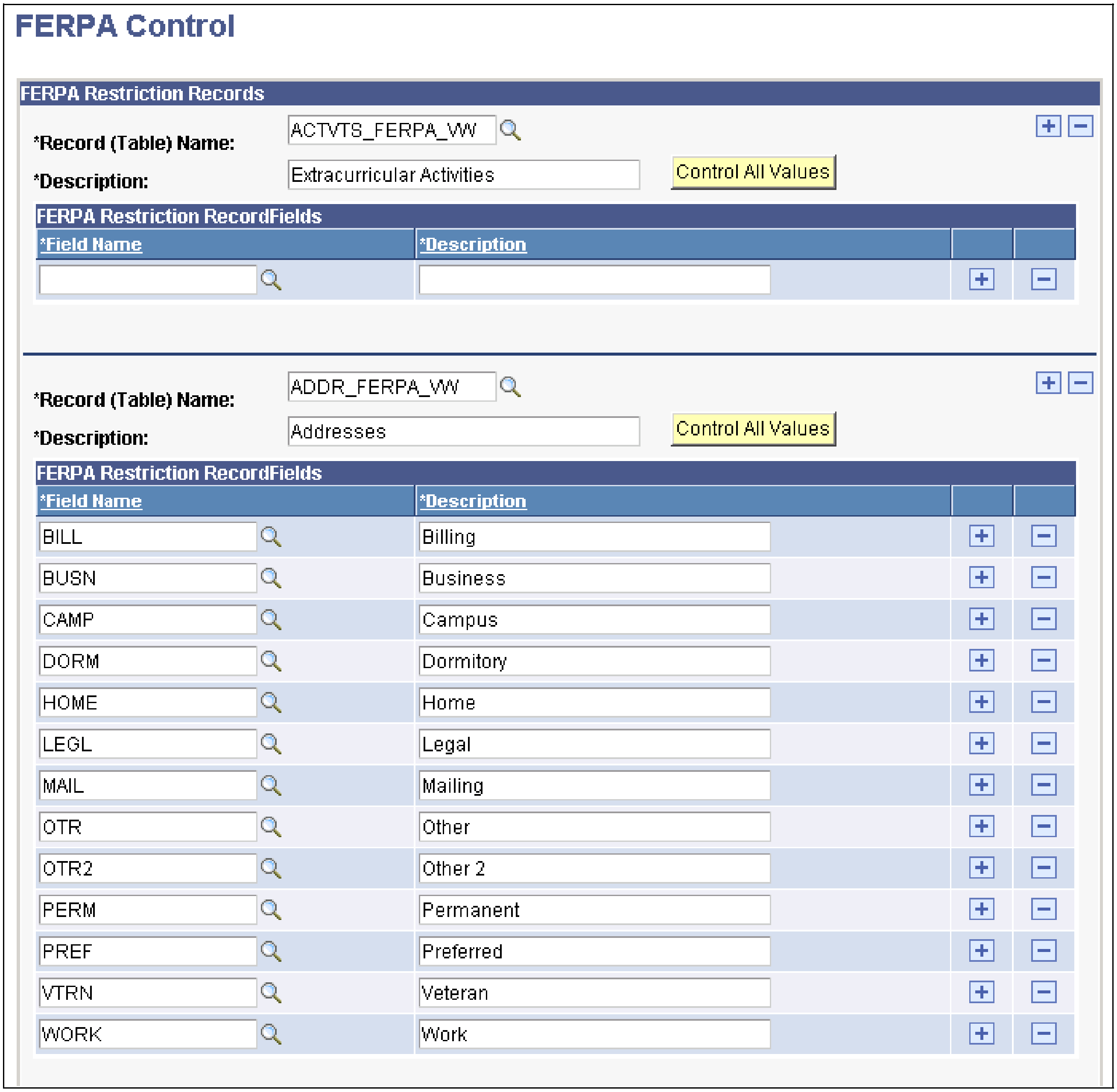
This section discusses how to make data available for FERPA privacy control.

Page Used to Make Data Available for FERPA Privacy Control

Page Name	***Definition Name***	***Navigation***	***Usage***
FERPA Control	FERPA_CONTROL	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, FERPA Control	Review or make additional directory data and other information available to FERPA privacy control.

Setting Data for FERPA Privacy Control

Access the FERPA Control page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, FERPA Control).


FERPA Control

FERPA Restriction Records

*Record (Table) Name: ACTVTS_FERPA_VW

*Description: Extracurricular Activities

Control All Values

FERPA Restriction RecordFields

*Field Name	*Description

*Record (Table) Name: ADDR_FERPA_VW

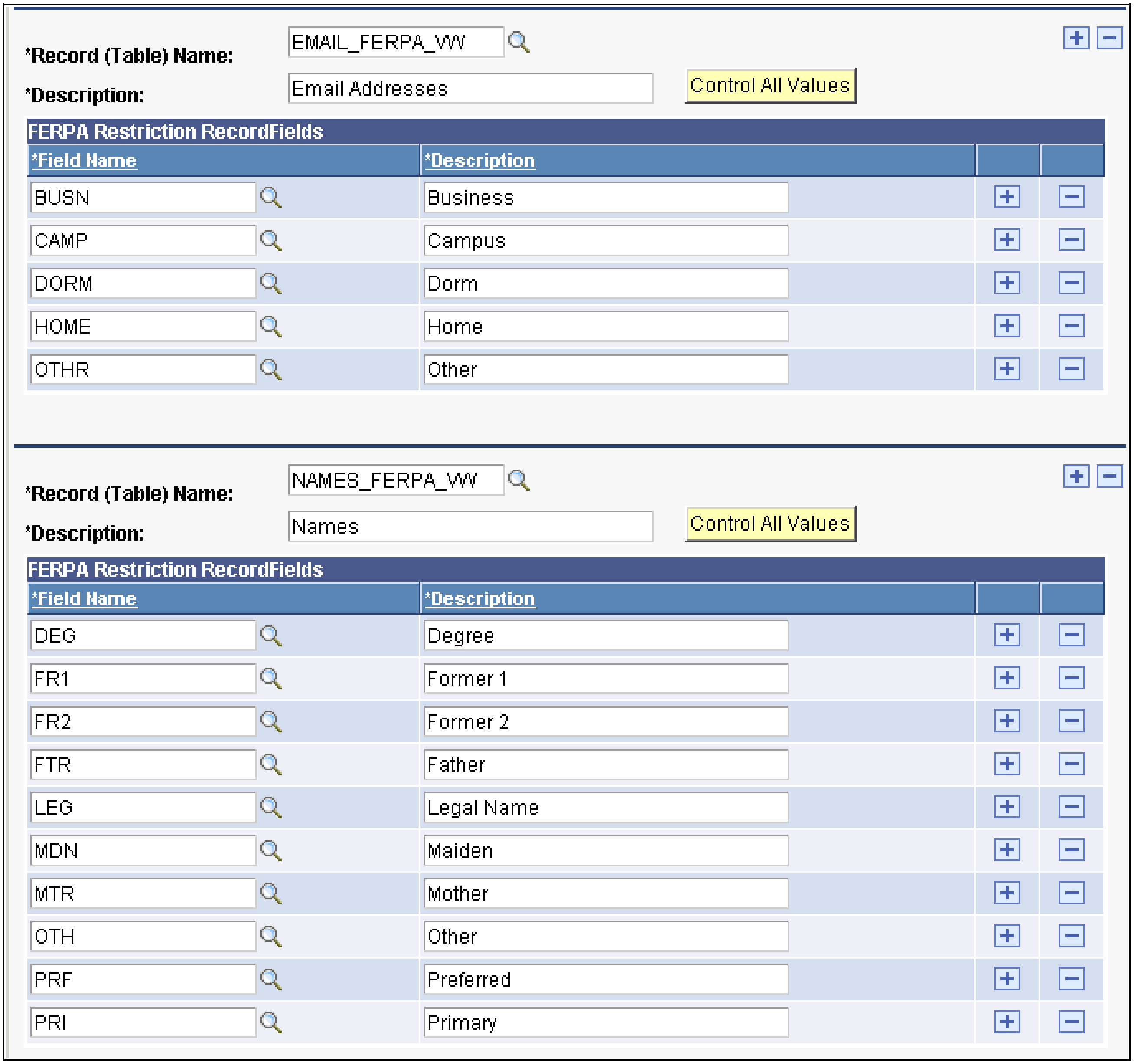
*Description: Addresses

Control All Values

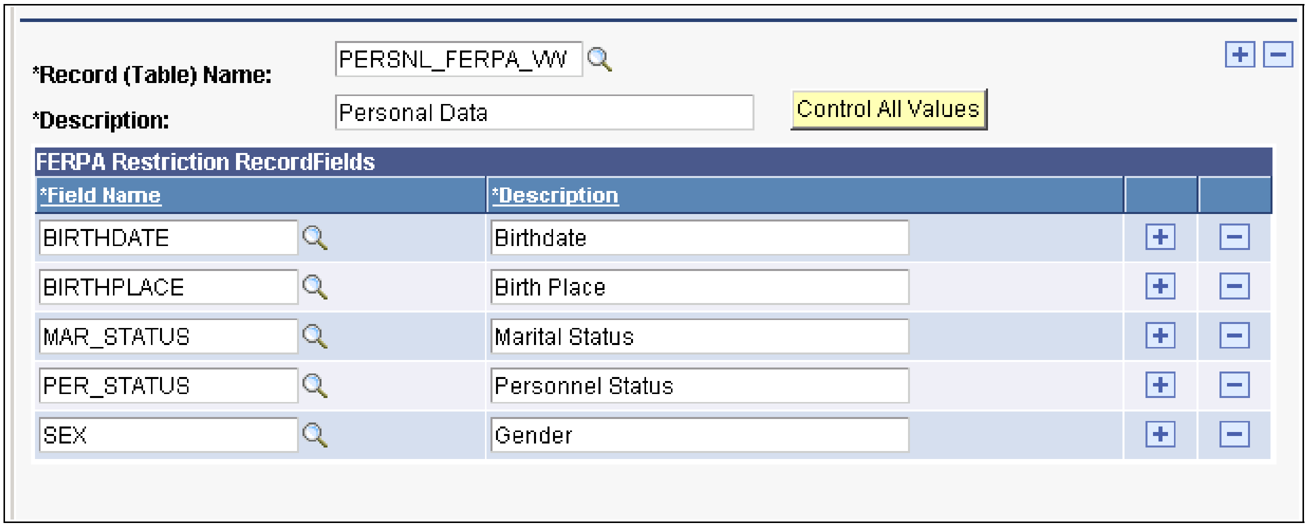
FERPA Restriction RecordFields

*Field Name	*Description
BILL	Billing
BUSN	Business
CAMP	Campus
DORM	Dormitory
HOME	Home
LEGL	Legal
MAIL	Mailing
OTR	Other
OTR2	Other 2
PERM	Permanent
PREF	Preferred
VTRN	Veteran
WORK	Work

FERPA Control page (1 of 4) - Extracurricular Activities and Addresses



FERPA Control page (2 of 4) - Email Addresses and Names



FERPA Control page (3 of 4) - Personal Data

FERPA Control page (4 of 4) - Phones and Photograph

FERPA Restriction Records

Record (Table) Name	Enter the FERPA view record that contains the type of information that your institution uses for directories or that contains additional information that your institution wants to make available for privacy control. The FERPA_VW records available are defined on the CC_FERPA_SEL_VW record. You can modify the view records.
Description	The system displays the description of FERPA_VW record that you entered.

Control All Values

Click this button to display all of the type-based controlled fields (address, phone, name, and email) from the selected record and make them available for privacy control.

FERPA Restriction Record Fields

Field Name

Enter the name of the field, from the FERPA_VW record, that contains the information to make available for privacy control.

When you select the record (table) name, the fields on that record become available here. If you click the Control All Values button, the system displays all the type-based controlled fields (valid for address, phone, name, and email only). You can delete and add fields to configure them to your institution's needs.

Description

The system displays the description of each field from the FERPA_VW record. You can modify the descriptions here.

These descriptions appear on the FERPA self-service page in PeopleSoft Campus Self Service. If you implement FERPA self-service, you might want to modify these descriptions.

Making Publications Available for Privacy Exceptions

To make publications available for privacy exceptions, use the Institution Publications component (INST_PUB_TBL) and the Publication Categories component (INST_CATG_TBL).

This section provides an overview of making publications available for FERPA exceptions and discusses how to:

- Create publication codes.
- Define publication categories.

Understanding Publications as Privacy Control Exceptions

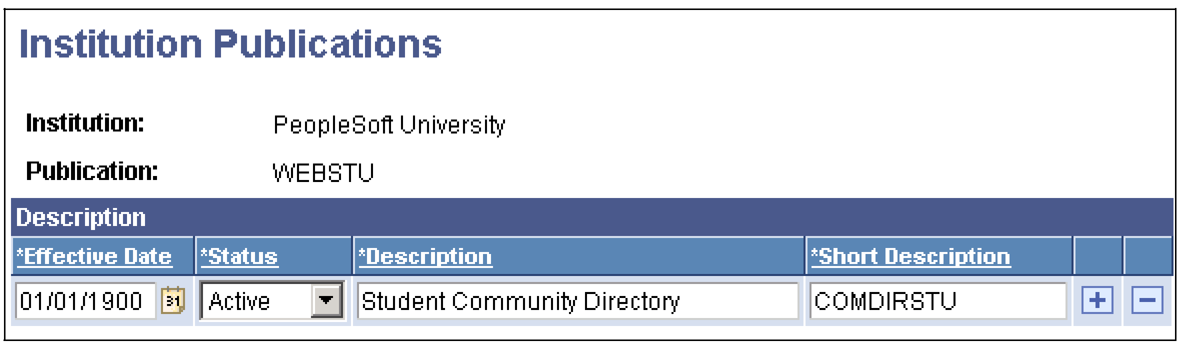
You can make publication categories available for exceptions to FERPA privacy restrictions. Students can then elect to permit your institution to release otherwise restricted data for publication in certain types of publications created for your institution. For example, a student might restrict the release of her name, home address, and phone number but permit you to include it in your internal student community directory.

Pages Used to Make Publications Available for Privacy Control Exceptions

Page Name	Definition Name	Navigation	Usage
Institution Publications	INST_PUB_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Institution Publications	Create or review codes for each of your institution's publications.
Publication Categories	INST_CATG_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Publication Categories	Organize your institution's publications into categories that you can make available for exception to an individual's FERPA restrictions.

Creating Publication Codes

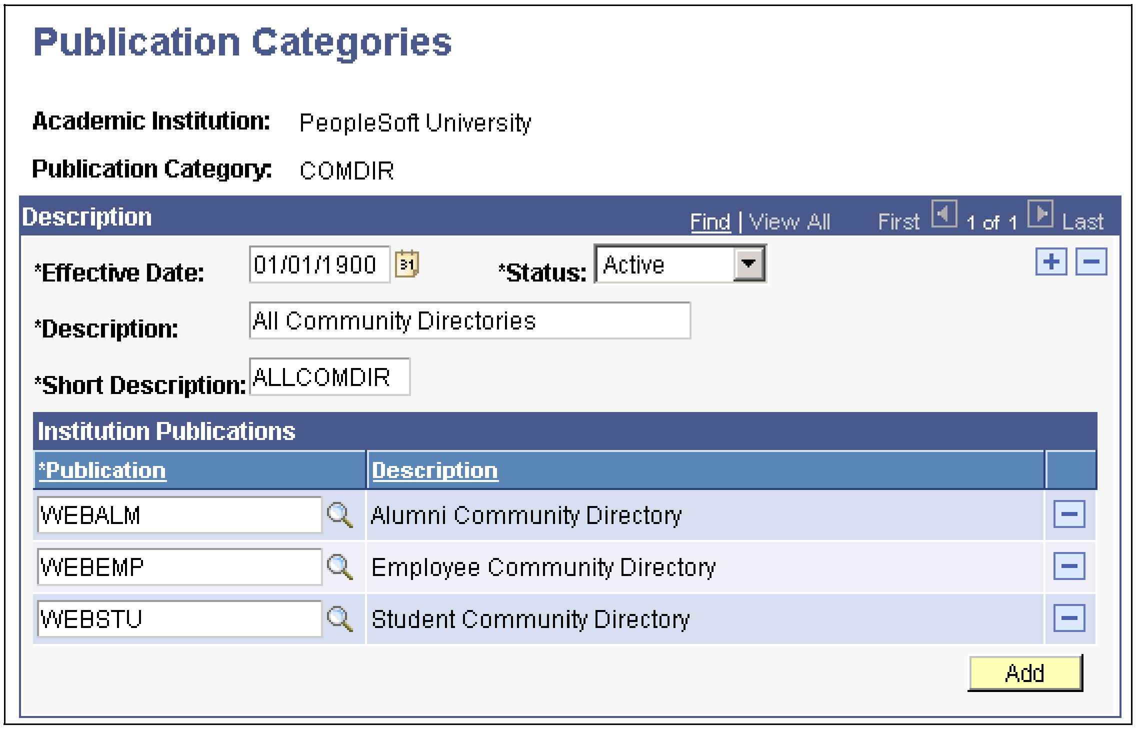
Access the Institution Publications page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Institution Publications).



Institution Publications page

Defining Publication Categories

Access the Publication Categories page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Publication Categories).



Publication Categories page

Description

Description

Enter the description of the publication category.

Two publication categories are delivered with your system: *All Community Directories* and *Student Community Directories.* These are used in PeopleSoft Campus Solutions Self Service. You can add new categories and add publications to the delivered categories, but do *not* delete the delivered categories.

Institution Publications

Publication

Enter the code for the specific publication in this category.

You can add publications to this category on the Institution Publications page.

Chapter 12

Using FERPA Web Services

This chapter provides an overview of FERPA web services, lists prerequisites, and discusses:

- Outbound and inbound services.
- FERPA service trigger components.
- FERPA service messages.

See Also

PeopleTools: Integration Broker

Understanding FERPA as a Service

With the increased distribution of Person data outward from Campus Solution as the system of record, institutions need the ability to determine whether students have elected to protect their information under U.S. FERPA (Family Educational Rights and Privacy Act) regulation, as well as the actual data elements they want protected. FERPA as a Service provides a publish or notify capability that indicates to external systems updates have been made to a student's denoted restrictions as well as a query and read capability that conveys the students indicated FERPA restrictions.

FERPA as a Service is designed to facilitate integration of the PeopleSoft system with external systems, for example the HECH solution. The service can be divided into two categories: Inbound service and Outbound service.

- The Outbound FERPA service facilitates keeping the constituent FERPA data restrictions synchronized with an external system.

  The Outbound FERPA service is an asynchronous service that will publish the FERPA data whenever it is updated in Campus Solutions.

- The Inbound FERPA service allows integrated systems to determine if FERPA restrictions are set up for a person and to retrieve what data elements those restrictions are set up for.

  The Inbound FERPA service is a synchronous web service that provides the EmplID as the request parameter and it includes the FERPA flag and FERPA record/field data elements as a response.

The base message for the service consists of the person's EmplID, the FERPA flag, and the record/fields specified through the FERPA Control component (FERPA_CONTROL). Administrators must review the FERPA_VW records in their system and configure them to reflect the type of information that their institution uses as directory information. The FERPA_VW records available are defined on the CC_FERPA_SEL_VW record. These view records can be modified by the institution and include specifying additional fields to incorporate more information within the same FERPA-controlled category. In addition, administrators can create and add new FERPA_VW records to add new categories to their systems FERPA control.

Prerequisites

Before using FERPA web services, review these assumptions:

- Campus Solutions is considered the system of record for FERPA restrictions.
- FERPA does not regulate whether you can move data from one system to another. It is about the public exposure of the FERPA-controlled data.
- Before you can apply and manage FERPA privacy control, you must establish FERPA privacy control fields.
- Before you can allow students to identify publications for which they release FERPA privacy restrictions, you must set up your institution's publications.
- The value of the FERPA flag (Y/N) value is exposed in both the FERPA service and the Constituent Web Service (CWS).

  The default value is set to (N), no restrictions set. If any FERPA restriction record fields are specified the FERPA flag is set to (Y). The CWS does not expose WHAT record/fields are restricted.
- Customers need to build the privacy controls/filters into HECH or other integrated systems to manage publication of FERPA data to avoid exposing FERPA data to 3rd parties.

In addition, before using FERPA web services, your application server must be configured such that the publish/subscribe servers are running, and domains and gateways are configured. In addition, in order to use the PERSON_DATA queue for web services, configure the Queue Definitions page so that the PERSON_DATA Queue Status is set to Run. You must also configure the integration gateway using Integration Broker.

See Also

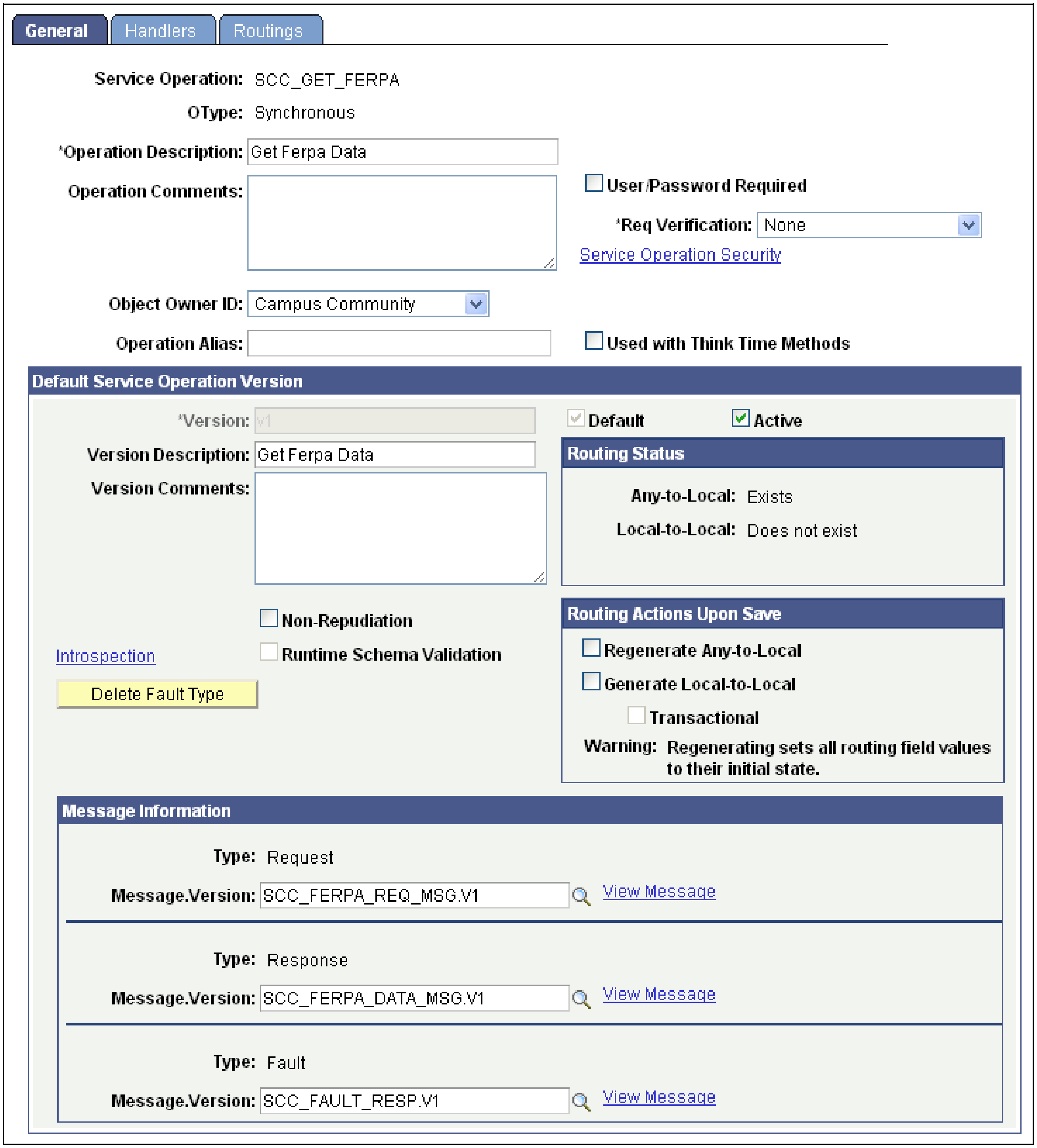
PeopleTools: Integration Broker

Inbound and Outbound Services

The PeopleSoft Campus Solutions system delivers one outbound FERPA service operation to notify external systems of changes to Campus Solutions constituent FERPA data and one inbound FERPA service operation to read ("get") FERPA details for a single constituent.

Inbound FERPA Service

The inbound FERPA service validates the EmplID of a constituent, if present, and populates the response message with the details of the restricted data of the constituent.



General page: inbound service

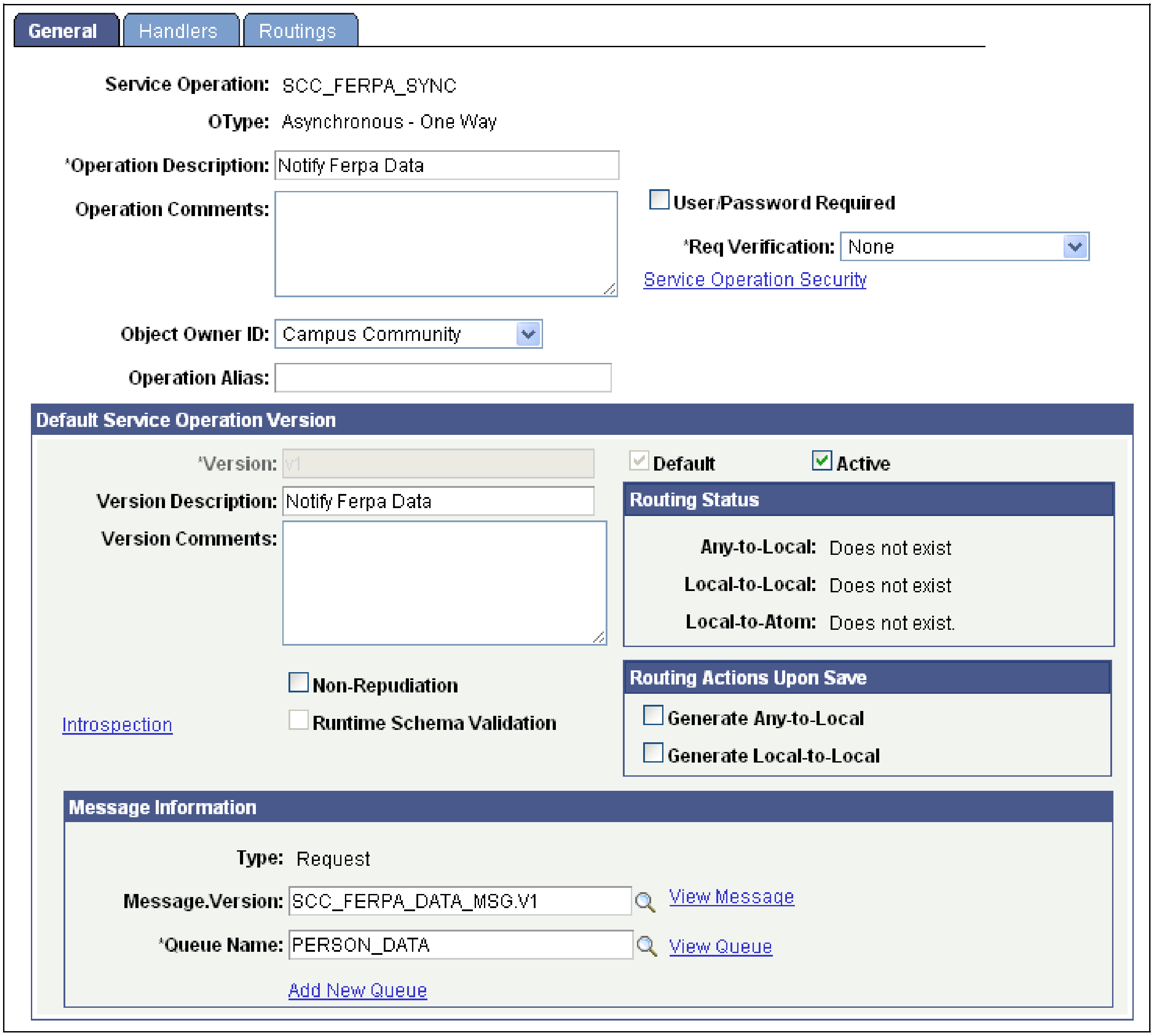
Description

Service	SCC_FERPA_SERVICE
Operation	SCC_GET_FERPA

Direction/Type	Inbound/Synchronous
Summary	Allows an external system to retrieve constituent FERPA data from the PeopleSoft system
Request Message	SCC _FERPA_REQ_MSG.V1
Response Message	SCC _FERPA_DATA_MSG.V1
Description	The Get FERPA Service takes an EmplID and returns the associated constituent FERPA restricted data. (record/fields)
Pre-Conditions	Valid EmplID
Processing	This service operation performs the following processing steps: 1. Looks up constituent FERPA restrictions based on EmplID. 2. Returns constituent FERPA restriction data records/fields.
Post-Conditions	Constituent FERPA Restriction Data Details returned.

Outbound FERPA Service

The outbound FERPA service publishes to or notifies external systems of changes to Campus Solutions FERPA data for constituents.



General page: outbound service

Description

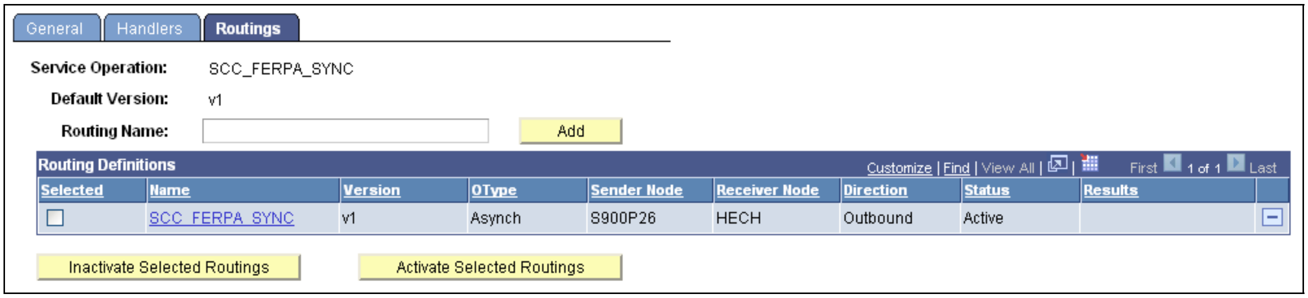
Service	SCC_FERPA_SYNC
Operation	SCC_FERPA_SYNC
Direction/Type	Outbound/Asynchronous
Summary	Updates a constituents FERPA data restrictions in an external system based on the restrictions set in the PeopleSoft Campus Solutions system.
Request Message	SCC _FERPA_DATA_MSG.V1
Queue Name	PERSON_DATA

Description	This service is configured to be published to an external system when a constituent's FERPA data restrictions are created or updated. This process is designed to keep a system like a hub, in sync with the Campus Solutions system. This is an asynchronous call, so there is no return.
Pre-Conditions	Valid constituent FERPA restriction data. Triggers are set up on FERPA administrative pages and self service pages.
Processing	This service operation performs the following processing steps: 1. A change or creation of constituent FERPA restriction data triggers an event. 2. The event sends out a message to an external system with the related constituent FERPA restriction data.
Post-Conditions	N/A Asynchronous

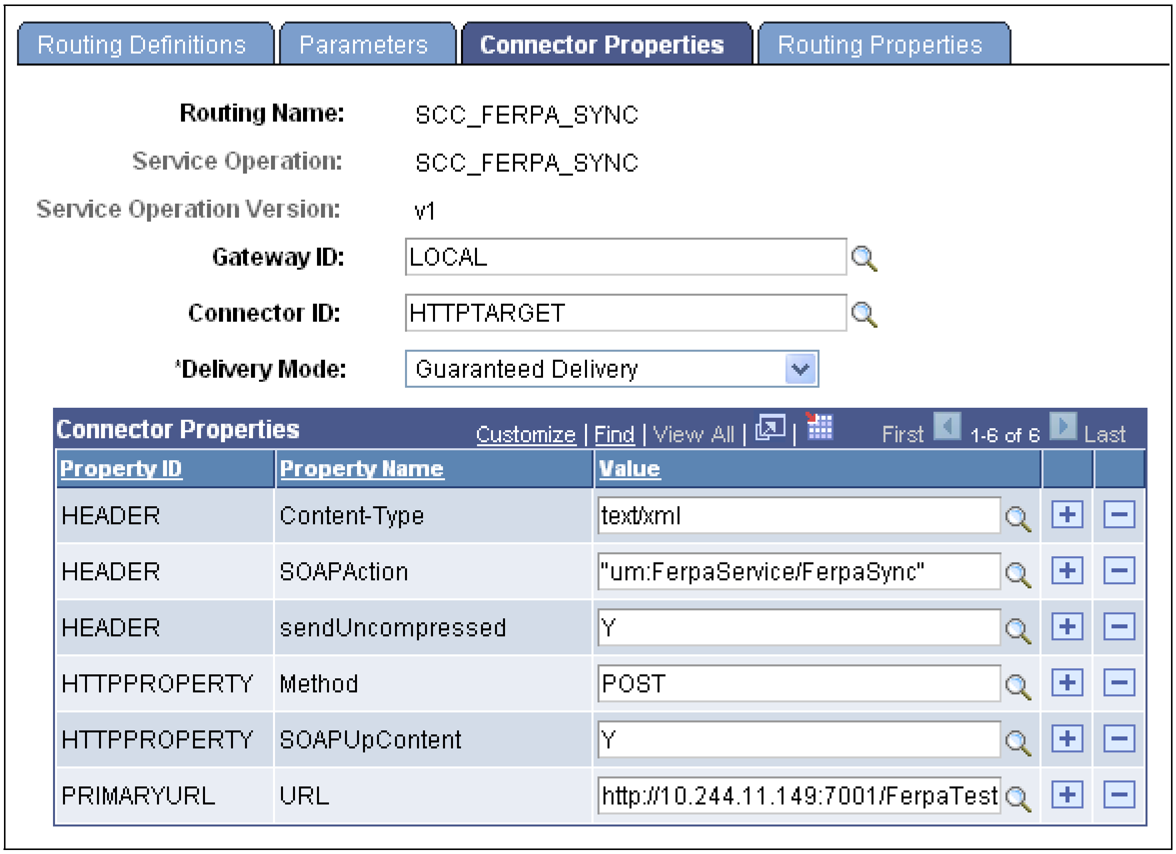
Create the Subscription by adding a new Routing to the SCC_FERPA_SYNC Service operation to consume the published messages in to third party integration system.

1. Navigate to People Tools, Integration Broker, Integration Setup, Service Operations.
2. Search for the SCC_FERPA_SYNC Service Operation and navigate to Routings Tab.
   a. Provide the Routing Name and click Add button.
   b. Enter Description.
   c. Sender Node: Local Node name of Campus Solutions.
   d. Receiver Node: any External Node name, such as HECH.
   e. Navigate to Connector Properties tab.

Gateway ID	Select Integration Gateway	
Connector ID	HTTPTARGET	
Connector Properties:		
HTTPPROPERTY	Method	POST
HTTPPROPERTY	SOAPUpContent	Y
HEADER	Content-Type	text/xml
HEADER	SOAPAction	<soapactionstring>
PRIMARYURL	URL	<endpoint url of the service provided in third party system> ex: http://hostname:port/ServiceName



Routings page



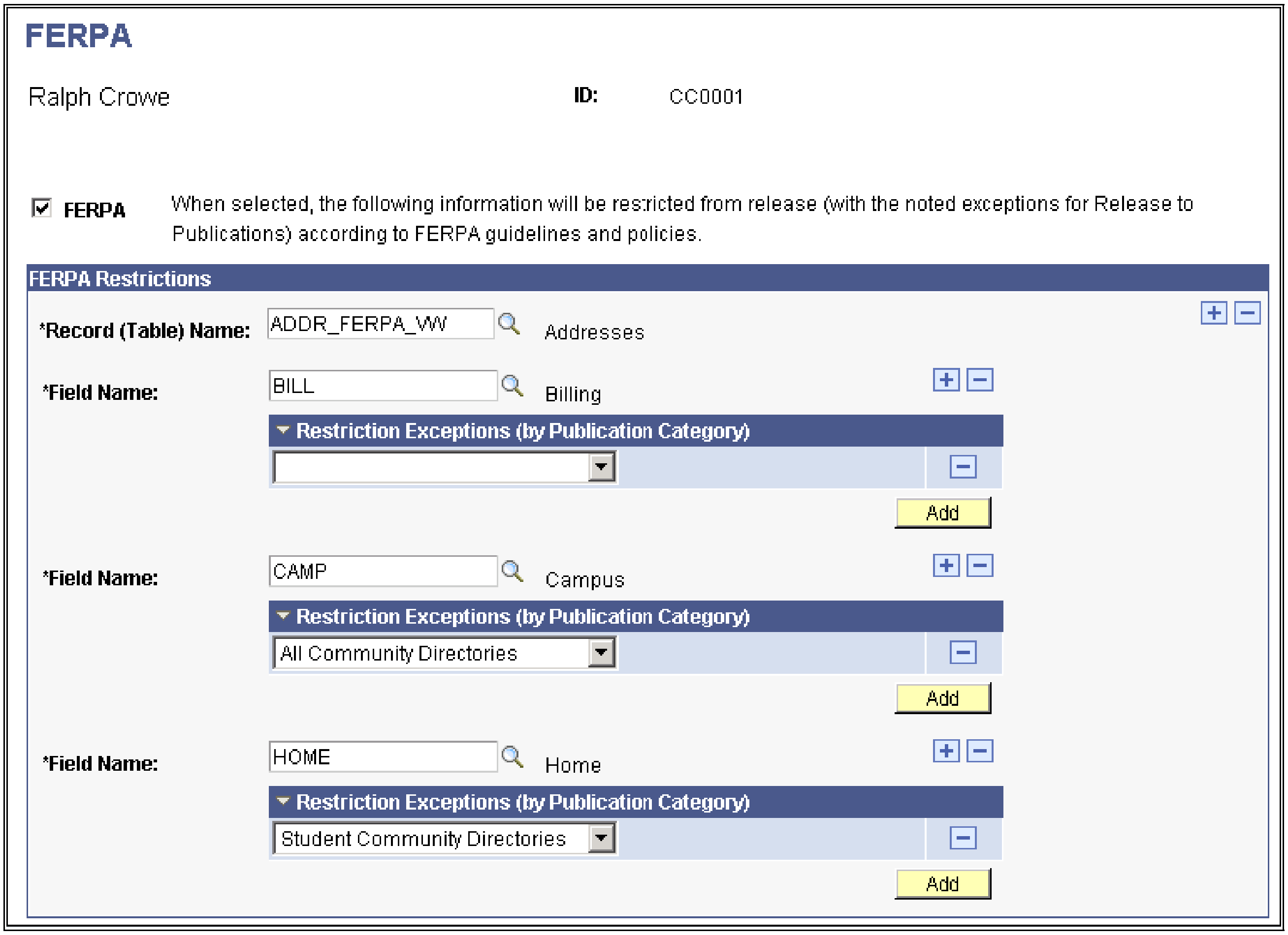
Connector Properties page

FERPA Service Trigger Components

There are currently three pages within the Campus Solutions where FERPA restrictions can be set. Two administrative pages (FERPA and FERPA Quick Entry) and one Self Service page (FERPA Restrictions). There are many pages where users can view the FERPA restrictions, but these pages do not allow access to create or update the current restrictions set for a person.

Administrative Page: FERPA

Navigation	Campus Community, Personal Information, Biographical, Person FERPA, FERPA Campus Community, Personal Information (Student), Biographical (Student), Student FERPA, FERPA
Page	FERPA
Component	FERPA



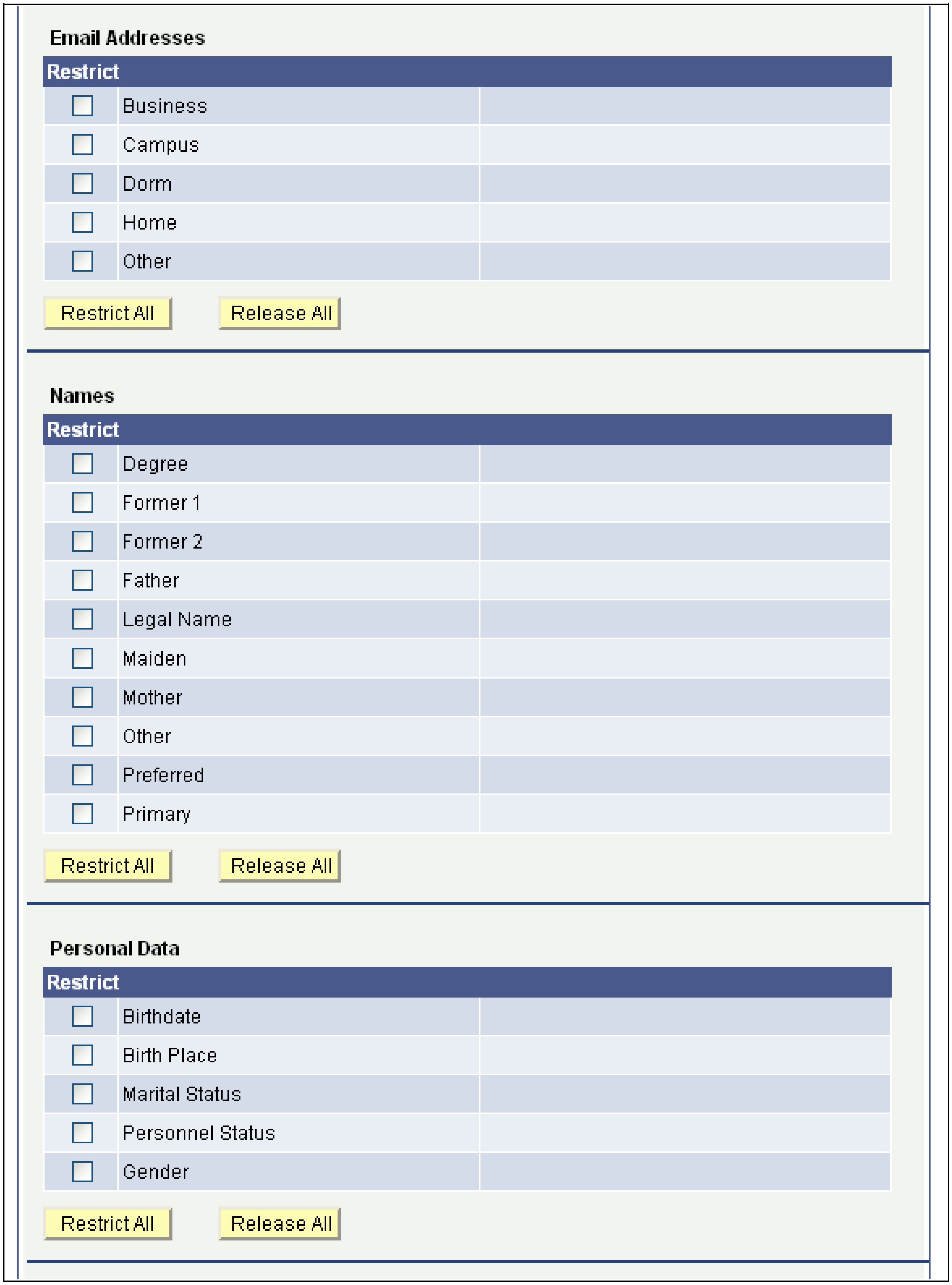
FERPA page

Administrative Page: FERPA Quick Entry

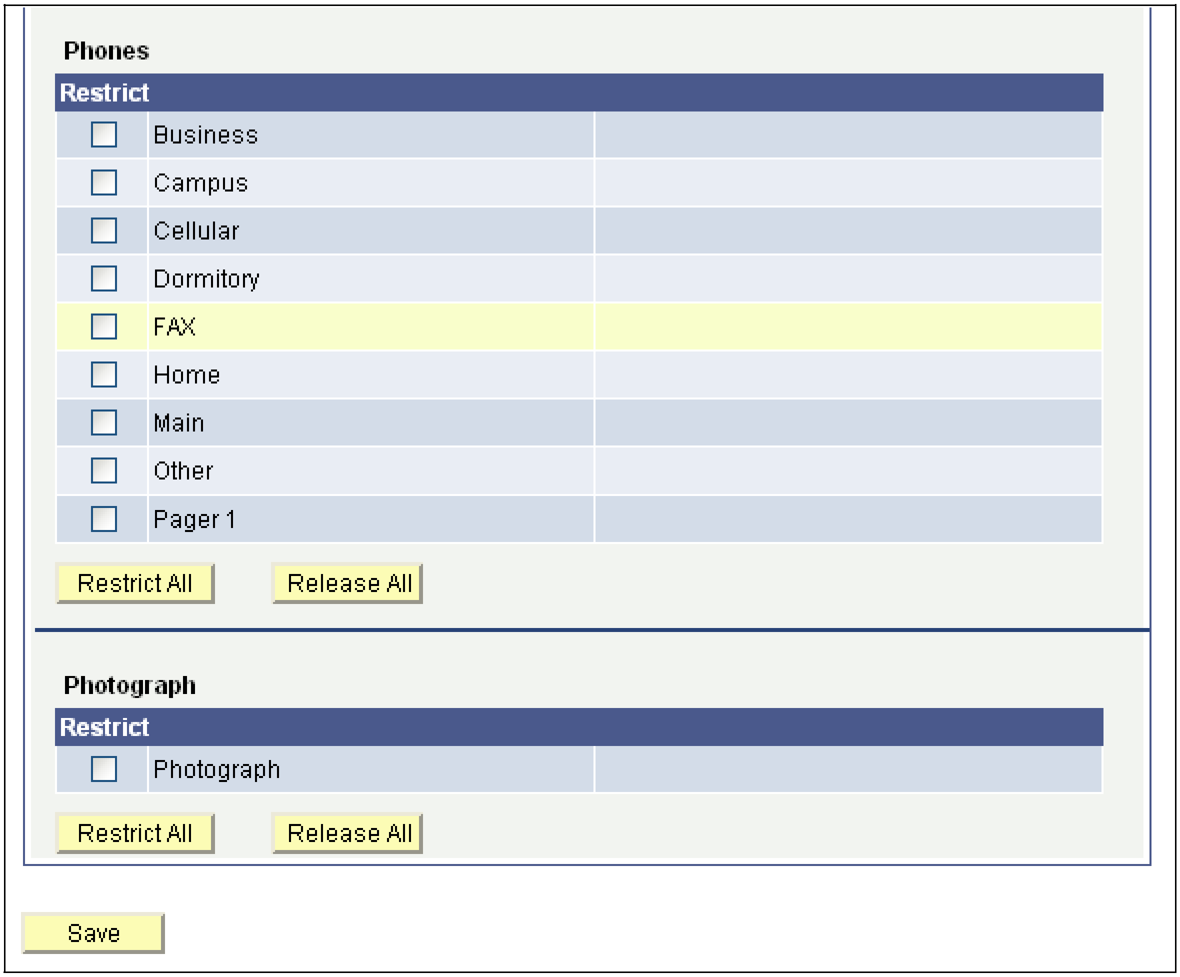
Navigation	Campus Community, Personal Information, Biographical, Person FERPA, FERPA Quick Entry Campus Community, Personal Information (Student), Biographical (Student), Student FERPA, FERPA Quick Entry

Page	FERPA_ADMIN_QENTRY
Component	FERPA_ADMIN_QENTRY

FERPA Quick Entry page (1 of 3)



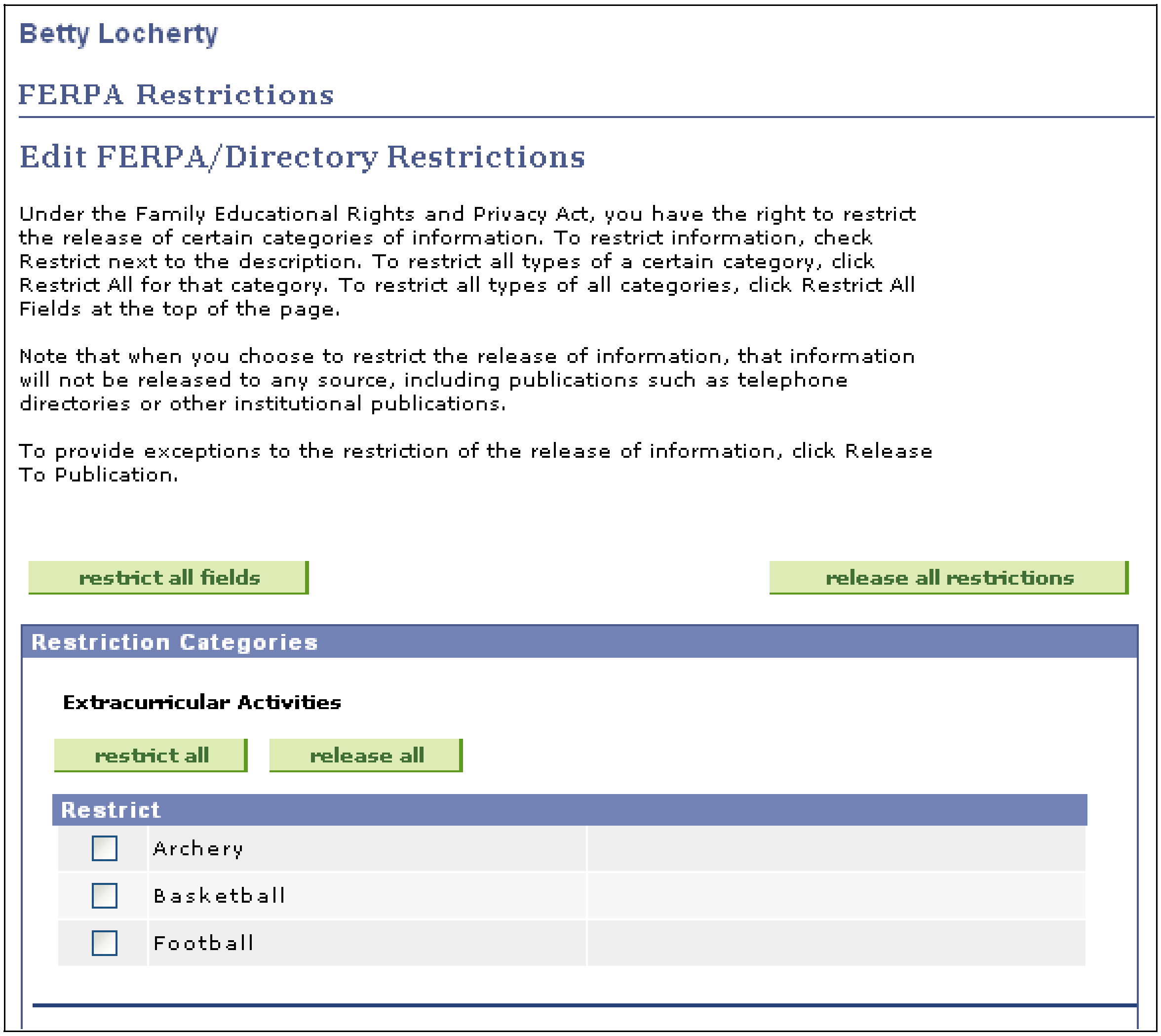
FERPA Quick Entry page (2 of 3)



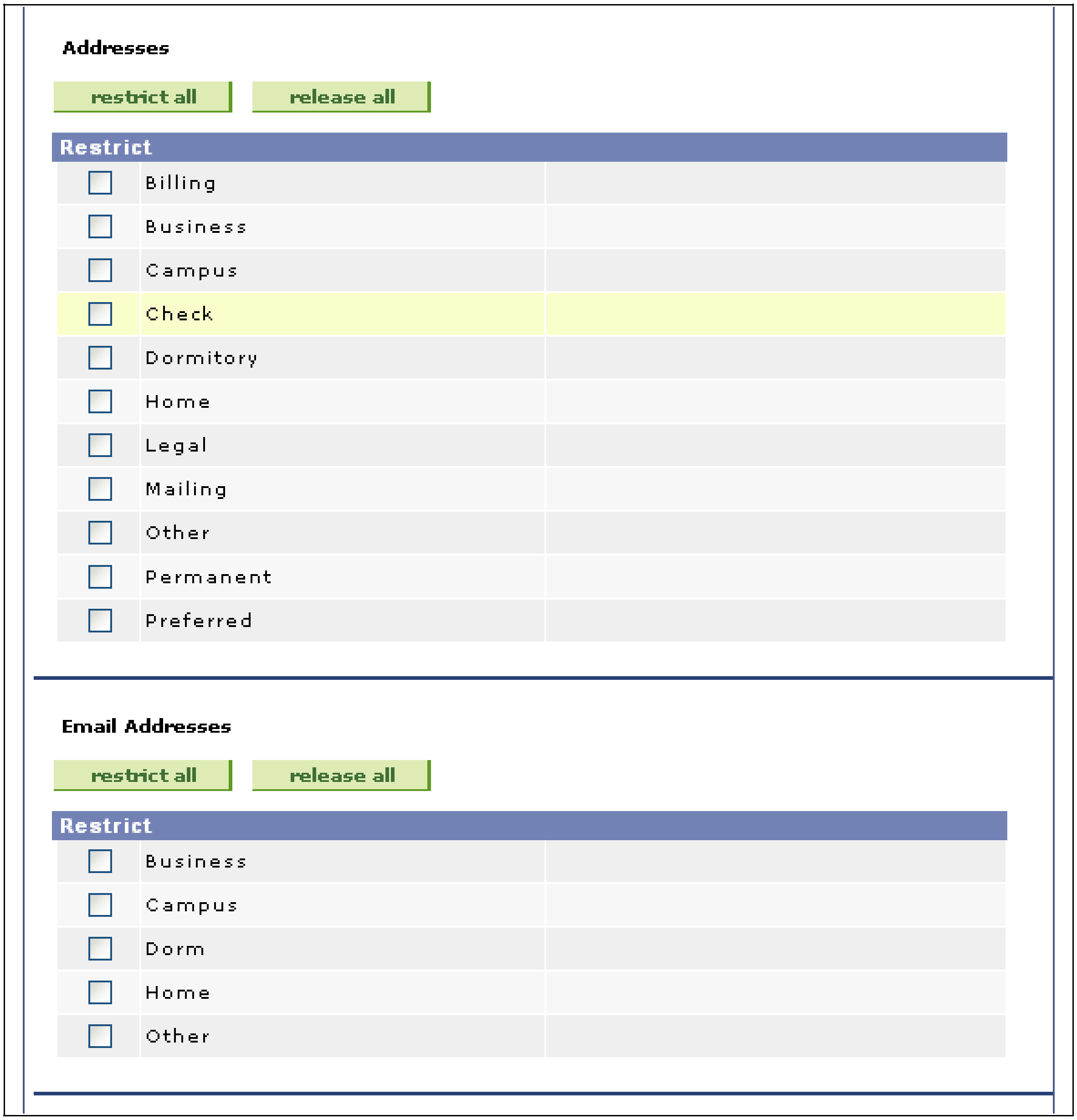
FERPA Quick Entry page (3 of 3)

Self Service Page: FERPA Restrictions

Navigation	Self Service, Campus Personal Information, FERPA Restrictions
Page	SS_CC_FERPA
Component	SS_CC_FERPA_SETUP

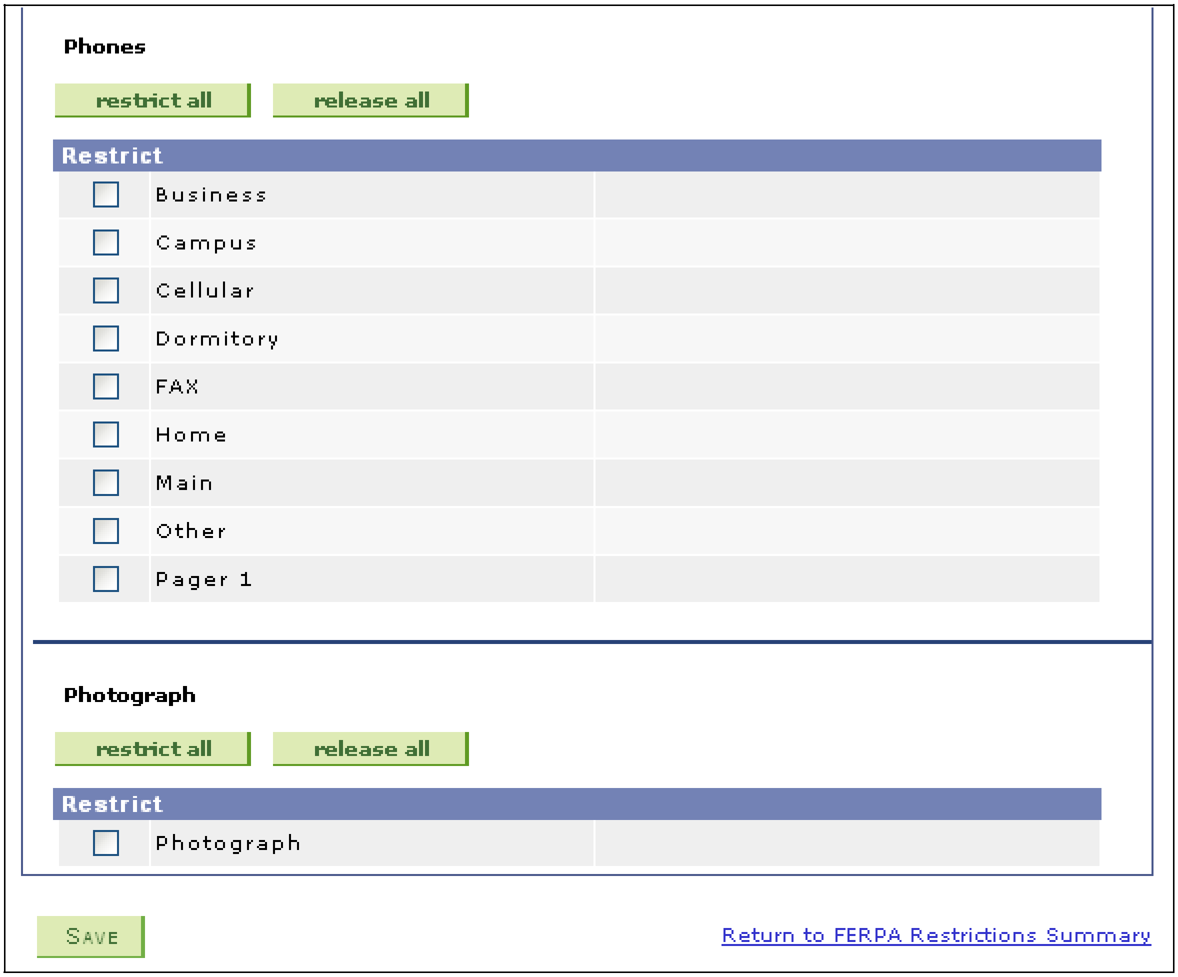


FERPA Restrictions page (1 of 4)



FERPA Restrictions page (2 of 4)

FERPA Restrictions page (3 of 4)



FERPA Restrictions page (4 of 4)

FERPA Service Messages

FERPA web services uses two types of messaging. The system generates outbound messages when a Constituent's FERPA data is changed in Campus Solutions. A change in any data element in the FERPA message definition raises this condition. The system publishes the FERPA message so that any integrated external system can be informed. When a third-party or external system needs to query the Campus Solutions database to view data, the system generates a query message. This is a synchronous inbound request/response get service, in which a third party raises a query or data request and the Campus Solutions system delivers a response that contains the requested data details.

FERPA web services deliver the following messages, which are defined using PeopleTools Integration Broker:

- SCC_FERPA_REQ_MSG
- SCC_FERPA_DATA_MSG

Message Property	***Value***
Message	SCC_FERPA_REQ_MSG
Version	V1
Message Alias	
Description	Ferpa Request Message
Message Type	Container based Message
Part Message	SCC _ENTITY_FERPA_REQ

Message Property	***Value***
Message	SCC_FERPA_DATA_MSG
Version	V1
Message Alias	
Description	Ferpa Data Message
Message Type	Container based Message
Part Message	SCC_ENTITY_FERPA_DATA

Message Property	***Value***
Message	SCC_ENTITY_FERPA_REQ
Version	V1
Message Alias	
Description	Ferpa Entity Request Part Message
Message Type	Non Rowset based Part Message

Message Property	***Value***
Message	SCC_ENTITY_FERPA_DATA
Version	V1
Message Alias	
Description	Ferpa Entity Data Part Message

Message Property	***Value***
Message Type	Non Rowset based Part Message

Sample Request Message:


```
<?xml version="1.0"?>
<SCC_FERPA_REQ_MSG xmlns:xs="http://www.w3.org/2001/XMLSchema">
  <SCC_ENTITY_FERPA_REQ>
    <EMPLID>AA0002</EMPLID>
  </SCC_ENTITY_FERPA_REQ>
</SCC_FERPA_REQ_MSG>
```


Sample Data Message:


```
<?xml version="1.0"?>
<SCC_FERPA_DATA_MSG>
  <SCC_ENTITY_FERPA_DATA>
    <EMPLID>AA0002</EMPLID>
    <FERPA>Y</FERPA>
    <SCC_FERPA_OVRD_VW>
      <RECNAME>Extracurricular Activities</RECNAME>
      <SCC_FERPA_OVERRIDE>
        <FIELDNAME>Archery</FIELDNAME>
        <SCC_FERPA_PUB_CATG>
          <INST_PUB_CATG>Directories</INST_PUB_CATG>
        </SCC_FERPA_PUB_CATG>
      </SCC_FERPA_OVERRIDE>
      <SCC_FERPA_OVERRIDE>
        <FIELDNAME>Basketball</FIELDNAME>
        <SCC_FERPA_PUB_CATG>
          <INST_PUB_CATG>Directories</INST_PUB_CATG>
        </SCC_FERPA_PUB_CATG>
        <SCC_FERPA_PUB_CATG>
          <INST_PUB_CATG>All Community Directories</INST_PUB_CATG>
        </SCC_FERPA_PUB_CATG>
      </SCC_FERPA_OVERRIDE>
      <SCC_FERPA_OVERRIDE>
        <FIELDNAME>Football</FIELDNAME>
        <SCC_FERPA_PUB_CATG>
          <INST_PUB_CATG>Student Community
          Directories</INST_PUB_CATG>
        </SCC_FERPA_PUB_CATG>
      </SCC_FERPA_OVERRIDE>
    </SCC_FERPA_OVRD_VW>
  </SCC_ENTITY_FERPA_DATA>
</SCC_FERPA_DATA_MSG>
```


Entities

The following entities are delivered:

SCC_FERPA_REQ

Entity ID:	
Name:	SCC_FERPA_REQ

Status:	Active
Entity Type:	Basic Entity
Description:	Ferpa Request Entity
AppClass:	
Prod Record:	SCC_PERS_SA_VW
Element (XML):	SCC_ENTITY_FERPA_REQ
Child Entities:	

SCC_FERPA_DATA

Entitiy ID:	
Name:	SCC_FERPA_DATA
Status:	Active
Entity Type:	Basic Entity
Description:	Ferpa Data Entity
AppClass:	
Prod Record:	SCC_PERS_SA_VW
Element (XML):	SCC_ENTITY_FERPA_DATA
Child Entities:	SCC_FERPA_OVRD_VW

SCC_FERPA_OVRD_VW

Entitiy ID:	
Name:	SCC_FERPA_OVRD_VW
Status:	Active
Entity Type:	Basic Entity
Description:	Ferpa Override View Entity
AppClass:	
Prod Record:	FERPA_OVRD_VW

Element (XML):	SCC_ FERPA_OVRD_VW
Child Entities:	SCC_FERPA_OVERRIDE

SCC_FERPA_OVERRIDE

Entitiy ID:	
Name:	SCC_FERPA_OVERRIDE
Status:	Active
Entity Type:	Basic Entity
Description:	Ferpa Override Entity
AppClass:	
Prod Record:	FERPA_OVERRIDE
Element (XML):	SCC_FERPA_OVERRIDE
Child Entities:	SCC_FERPA_PUB_CATG

SCC_FERPA_PUB_CATG

Entitiy ID:	
Name:	SCC_FERPA_PUB_CATG
Status:	Active
Entity Type:	Basic Entity
Description:	Ferpa Pub Catg Entity
AppClass:	
Prod Record:	FERPA_PUB_CATG
Element (XML):	SCC_FERPA_PUB_CATG
Child Entities:	

Chapter 13

Setting Up Personal Identification Data

This chapter discusses how to:

- Set up citizenship and passport data.
- Set up visa and permit data.
- Set up residency rules.

Note. No specific setup is required for driver license data, external system ID, photos, or personal identification numbers (PINs).

Setting Up Citizenship and Passport Data

Setting Up Visa and Permit Data

Setting Up Residency Rules

To set up residency rules, use the Residency Table (RESIDENCY_TABLE) component and Residency Exception Table (RESID_EXCPT_TABLE) component.

This section discusses how to:

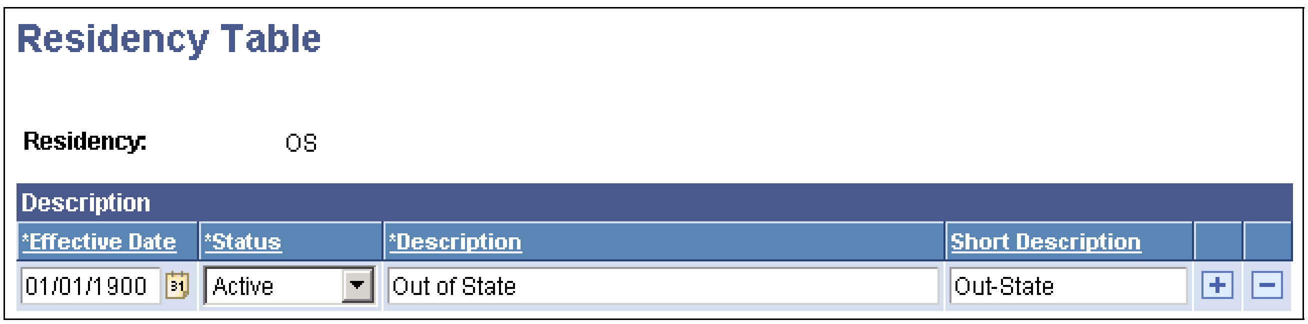
- Define residency rules.
- Define residency rule exceptions.

Pages Used to Set Up Residency Rules

Page Name	Definition Name	Navigation	Usage
Residency Table	RESIDENCY_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Table	Define codes for residency rules.
Residency Exception Table	RESID_EXCPT_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Exception Table	Define codes residency rule exceptions.

Defining Residency Rules

Access the Residency Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Exception Table).

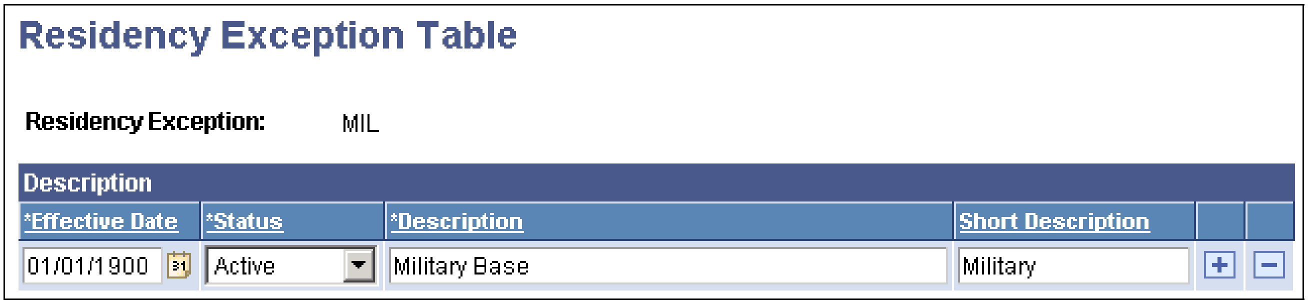


Residency Table page

Enter information to describe the residency code that you want to create.

Defining Residency Rule Exceptions

Access the Residency Exception Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Residency Exception Table).



Residency Exception Table page

Enter information to describe the residency exception code that you want to create.

Chapter 14

Setting Up Health Data

This chapter discusses how to:

- Set up physicians.
- Set up diagnosis codes.
- Set up accommodations.
- Set up immunization and health test types.

Setting Up Physicians

You can set up physicians (including addresses and phone numbers) in your database so that they are available to reference when tracking health data.

Setting Up Diagnosis Codes

You can set up codes to identify injuries and illnesses and use them to monitor health and safety incidents. Physicians often use standard terminology to describe the results of their examinations. You can set up the same standard codes, such as those that the American Medical Association has established, or enter your own institution-specific codes.

Setting Up Accommodations

You can set up codes for the types of accommodations that your institution makes for individuals with health restrictions and disabilities, such as purchasing special equipment or making structural changes to a classroom or work environment. You can use these codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and the party who is responsible for them.

Note. Several fields on the Accommodations pages—Regulatory Region, Job Code, Job Location, and Job Code Tasks—are defined on pages from the HRMS job attributes menus. If your institution uses PeopleSoft HRMS, read the HRMS documentation to determine how those items are used there. Use shared accommodation fields as needed.

Setting Up Immunization and Health Test Types

To set up immunization test types, use the Immunization Table component (IMMUNIZATION_TABLE). To set up health test types, use the Health Test Table component (HEALTH_TST_TABLE).

Set up codes to identify the immunization and general health tests that your institution requires or that students typically choose to report. You can use these codes to record and track an individual's immunization and general health test data.

This section discusses how to:

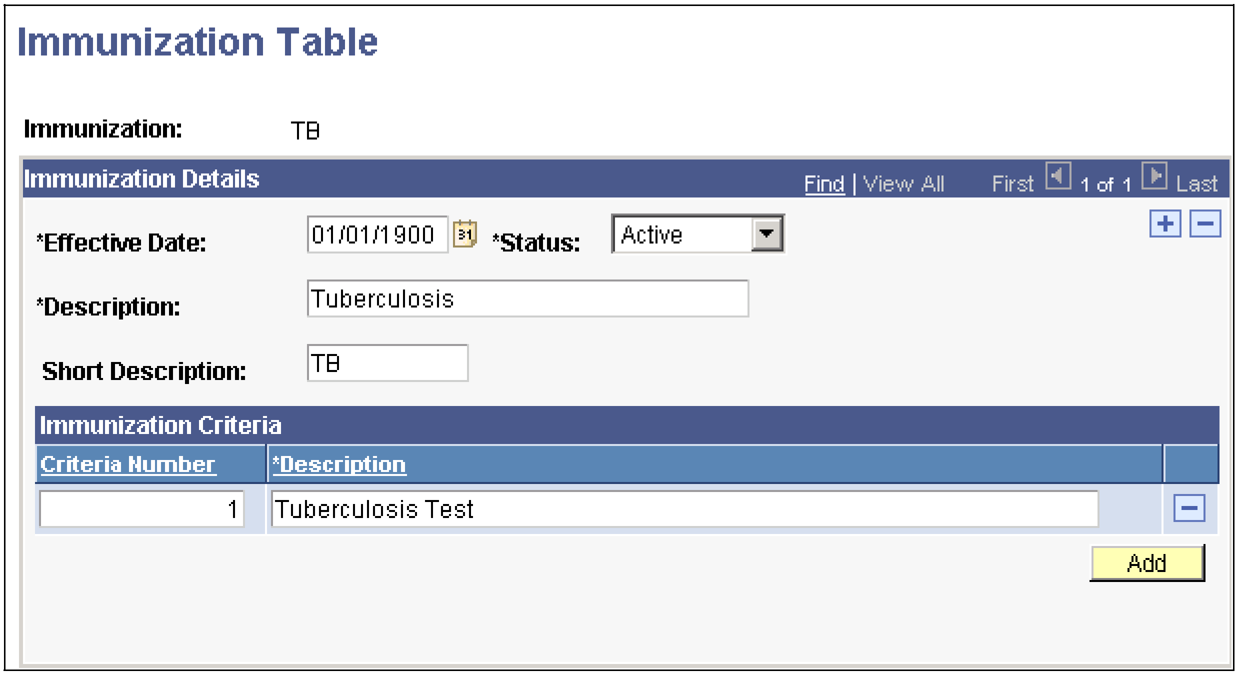
- Define immunization test codes.
- Define health test codes.

Pages Used to Set Up Immunization and Health Test Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Immunization Table	IMMUNIZATION_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Immunization Table	Define or review codes for immunization tests.
Health Test Table	HEALTH_TST_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Health Test Table	Define or review codes for health tests.

Defining Immunization Test Codes

Access the Immunization Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Immunization Table).



Immunization Table page

Immunization Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with this immunization. These fields are optional.

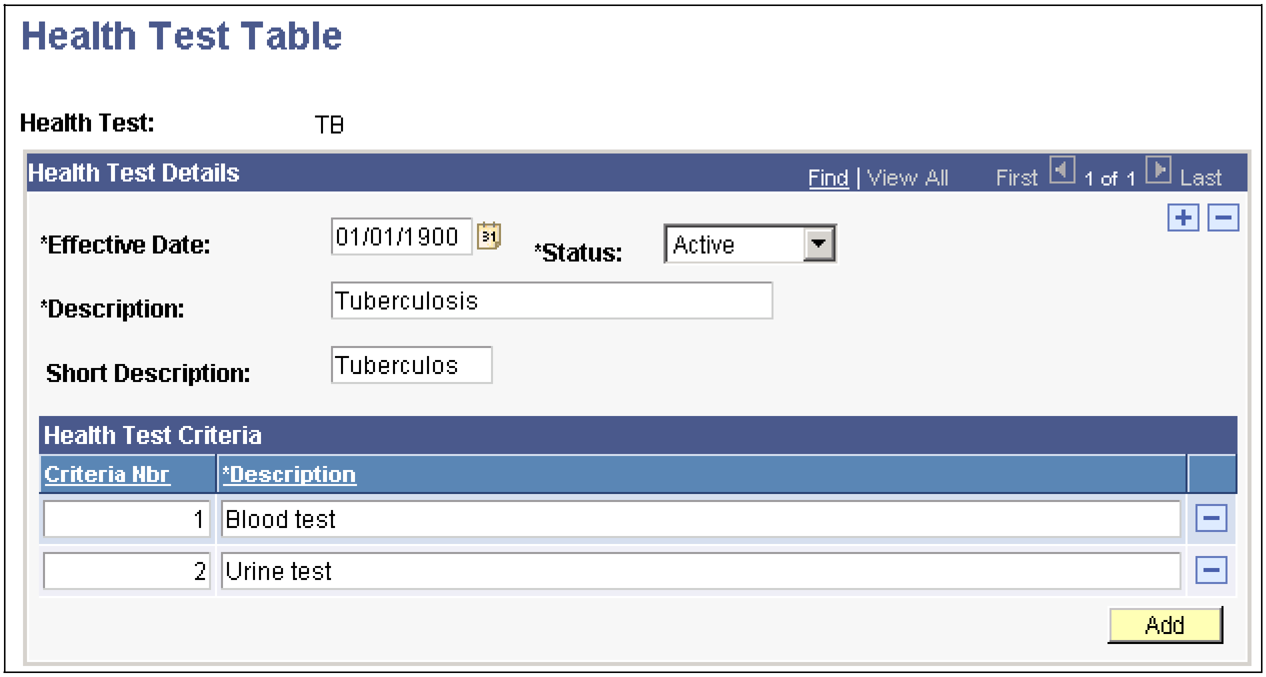
Criteria Number The system displays the number of the item on the list of criteria for the immunization.

The system displays the next sequential number for each item that you add. You can use these numbers as reference IDs for items in a randomly ordered list. Or, you can override them to reorder the list of items according to the order in which the events must occur.

Description Enter the description of the item or event.

Defining Health Test Codes

Access the Health Test Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Health Test Table).



Health Test Table page

Health Test Criteria

Use the fields in this group box to set up a numbered list of events or any list of items to associate with a health test. These fields are optional.

Criteria Number	The system displays the number of the item on the list of criteria for the health test. The system automatically enters the next sequential number for each item that you add. You can use these as reference IDs for items in a randomly ordered list or override them to reorder the list of items according to the order in which the events must occur.
Description	Enter the description of the item or event.

Chapter 15

Setting Up Participation Data

This section discusses how to:

- Set up athletic participation.
- Set up extracurricular activities.
- Set up honors and awards.
- Set up licenses and certificates.
- Set up memberships.

Setting Up Athletic Participation

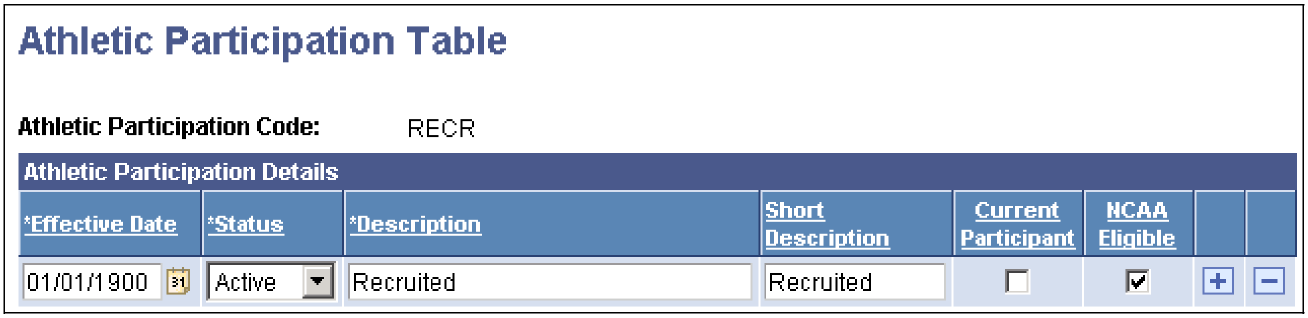
To set up athletic participation, use the Athletic Participation Table component (ATHL_PART_TABLE). This section discusses how to set up athletic participation codes.

Page Used to Set Up Athletic Participation

Page Name	*Definition Name*	*Navigation*	*Usage*
Athletic Participation Table	ATHL_PART_TABLE	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Athletic Participation Table	Set up or review athletic participation codes.

Defining an Athletic Participation Code

Access the Athletic Participation Table page Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Athletic Participation Table).



Athletic Participation Table page

Current Participant	Select this check box to set the default participation associated with this code to current participant.
NCAA Eligible (National Collegiate Athletic Association eligible)	Select this check box to set the default participation associated with this code to a current eligibility to participate according to NCAA rules and regulations.

Setting Up Extracurricular Activities

To set up extracurricular activities, use the Extracurricular Activities component (EXTRA_ACTIVITY_TBL).

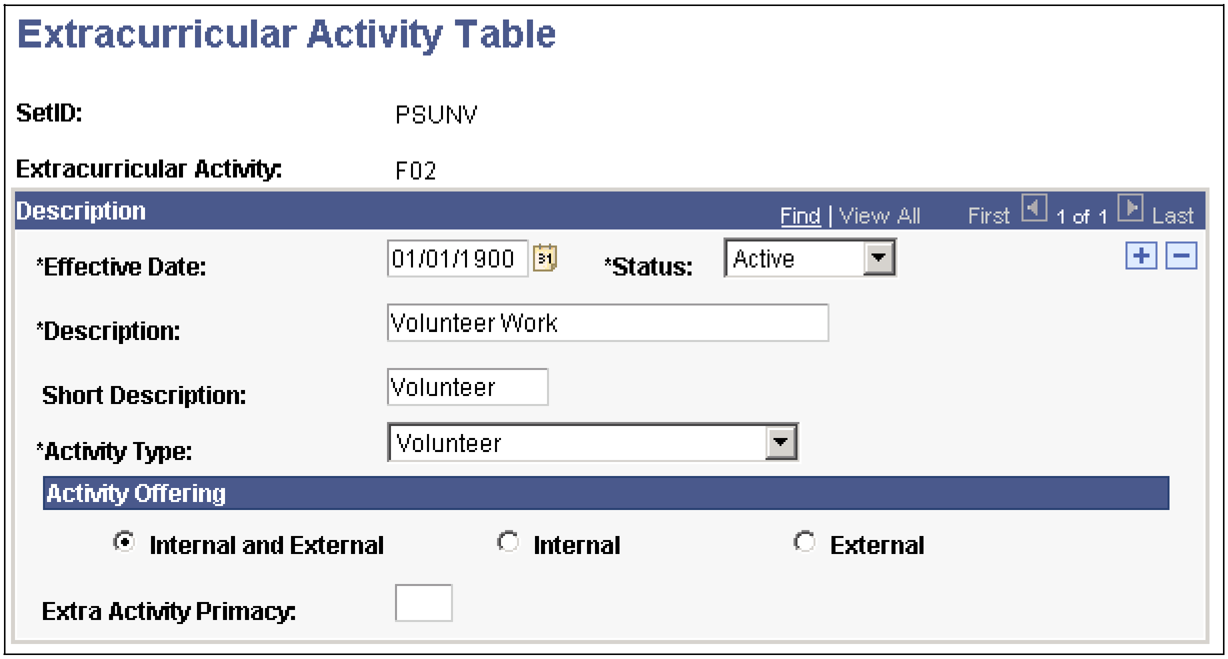
This section discusses how to set up extracurricular activity codes.

Page Used to Set Up Extracurricular Activities

Page Name	*Definition Name*	*Navigation*	*Usage*
Extracurricular Activity Table	EXTRA_ACTIVITY_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Tbl	Set up or review the types of student activities to track.

Defining an Extracurricular Activity Code

Access the Extracurricular Activity Table page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Setup, Extracurricular Activity Tbl).



Extracurricular Activity Table page

Description

Activity Type

Enter the type of activity *(Athletics*, *Student Government*, *Theater*, *Volunteer* and so on) that you are defining.

Activity type values are delivered with your system as translate values. You can modify these translate values if necessary.

Activity Offering

Internal and External

Select this check box to indicate that this activity is offered within and outside of your institution.

Internal

Select this check box to indicate that this activity is offered only within your institution.

External

Select this check box to indicate that this activity is offered only outside of your institution.

Extra Activity Primacy

Enter the number that describes the level of importance of this extracurricular activity. The lower the number the higher the importance.

For example, a primacy number of *1* indicates that this is a primary or most important activity. A primacy number of *10* indicates that this is an activity of much lesser importance.

Setting Up Honors and Awards

You can set up honors and awards and track them, whether earned internally or externally.

PeopleSoft Student Records tracks honors and awards and uses them for transcripts and graduation.

Page Used to Set Up Honors and Awards

Page Name	***Definition Name***	***Navigation***	***Usage***
Honors/Awards Table	SA_HON_AWRD_TABLE	• Set Up SACR, Product Related, Define Campus Community, Setup, Honors and Awards • Set Up SACR, Product Related, Student Records, Student Standing and Award, Honors/Awards Table	Set up internal and external honors and awards.

Setting Up Licenses and Certificates

You can set up licenses and certificates to track the achievements of individuals in your campus community.

Setting Up Memberships

You can set up memberships to identify the affiliations of individuals in your campus community.

Chapter 16

Setting Up Organization Data

This chapter discusses how to:

- Define organization groups and contacts.
- Create or load external organization codes.
- Set up external subject categories and term sessions.
- Set up external education comments.
- Set up organization types.
- Set up NAICS codes.

Defining Organization Groups and Contacts

To define organization groups and contacts, use the Organization Group Table component (ORG_GRP_CD_TABLE) and the Contact Type Table component (ORG_CNTCT_TYPE_TBL).

This section provides an overview of group types and discusses how to:

- Define organization group types.
- Define contact types.

Understanding Group Types

Group types and codes within each group type enable you to group similar organizations at a high level and further define them into specific categories. For example, in admissions, you can group organizations according to their academic quality by setting up a high-level group type of *Academic Quality.* Within that group type, you can further identify each organization in the group by assigning group codes of *Below Average, Average,* and *Highly Competitive.* Some organization group types are predefined when your system is shipped. Review these to be sure they meet your institution's needs; create others if necessary.

You can also set up the types of contact persons typically available to your institution. Contact types help you to identify the role of the contact person at each organization in your database. For example, you might indicate that the contact for Cottonwood High School is Mr. Raymond Scott, but you probably also want to specify whether he is a teacher, guidance counselor, or the principal.

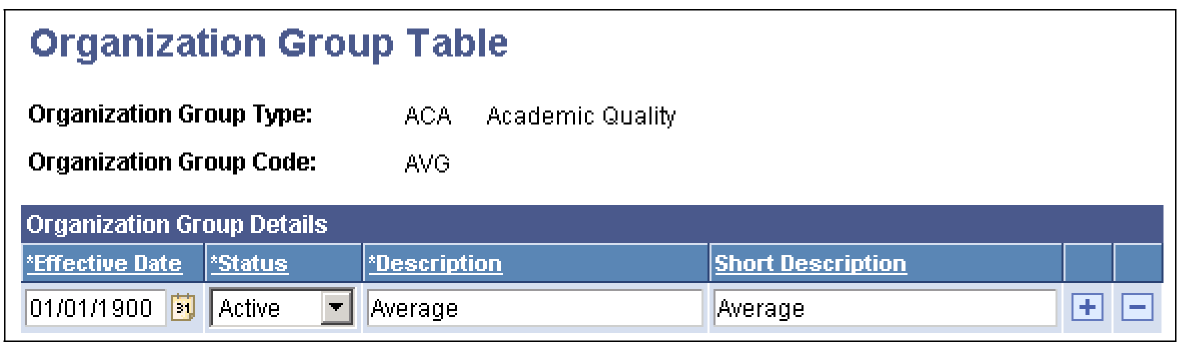
Although these examples relate to schools, you can also use group types, group codes, and contact types to organize all types of organizations in your system.

Pages Used to Define Groups and Contacts

Page Name	***Definition Name***	***Navigation***	***Usage***
Organization Group Table	ORG_GROUP_TABLE	Campus Community, Organization, Define Organization Data, Organization Group Table	Define organization group types and associate them with group codes.
Contact Type Table	ORG_CNTC_TYP_TABLE	• Campus Community, Organization, Define Organization Data, Contact Type Table • Set Up SACR, Product Related, Contributor Relations, Constituent Information, Contact Type Table	Define the type of contacts that your institution might have with the organizations.

Defining Organization Group Types

Access the Organization Group Table page (Campus Community, Organization, Define Organization Data, Organization Group Table).

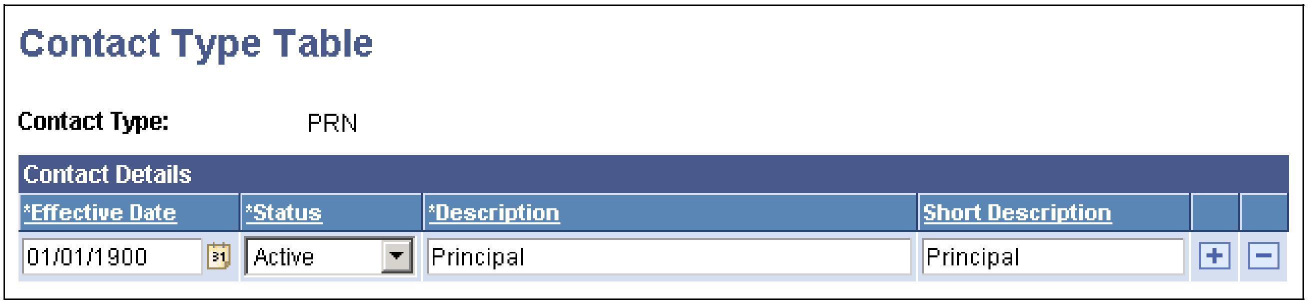


Organization Group Table page

Enter information to define the organization group that you want to create.

Defining Contact Types

Access the Contact Type Table page (Campus Community, Organization, Define Organization Data, Contact Type Table).



Contact Type Table page

Enter information to define the organization contact type that you want to create.

Creating or Loading External Organization Codes

To create or load external organization codes, use the External Organization Code Type Table component (EXTORGCDTYPE_TABLE).

This section provides an overview of external organization codes and discusses how to load or define external codes for organization types.

Understanding External Organization Codes

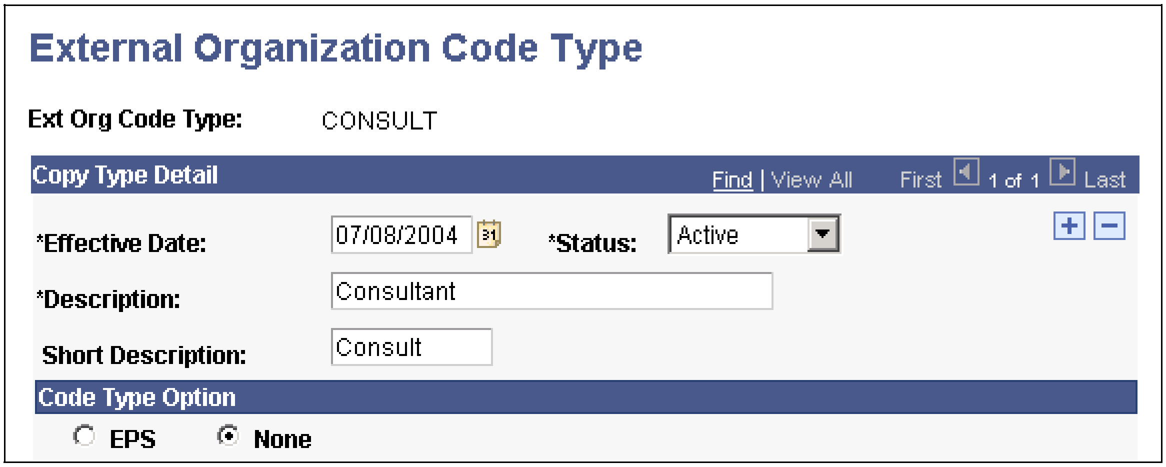
Load or set up external agency codes to make them available to associate with organizations. For example, if your institution loads Enrollment Planning Service (EPS) market codes, the load process enters each code on the External Organization Code Type table. Those codes are then available for you to assign to organizations on the Organization External Codes page.

Page Used to Create External Organization Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
External Organization Code Type	EXTORGCDTYPE_TABLE	Campus Community, Organization, Define Organization Data, Ext Org Code Type Table	Load or define external codes for organization types.

Loading or Defining External Codes for Organization Types

Access the External Organization Code Type page (Campus Community, Organization, Define Organization Data, Ext Org Code Type Table).



External Organization Code Type page

Code Type Option

EPS Select to indicate that this code is an EPS market code.

None Select to indicate that this code is not an EPS market code.

Setting Up External Subject Categories and Term Sessions

To set up external subject categories and term sessions, use the External Subject Table component (EXT_SUBJECT_TBL) and the External Term component (EXTERNAL_TRM_TABLE).

This section provides an overview of external subjects, terms, and categories, and discusses how to:

- Define external subject categories.
- Define external term sessions.

Understanding External Subjects, Terms, and Courses

External subjects are general subject areas that you define for the purpose of categorizing external courses.

Set up external subject categories to broadly identify the subjects offered at external institutions. Use those categories to identify which institutions offer courses in those subjects. For example, perhaps one of the entrance requirements at your institution is four years of high school English. Various high schools offer classes titled 17th Century English Literature, Mystery Writers of America, and A Journey through Time with Shakespeare. When these classes appear on a student's transcript they do not readily translate as English courses. If you create a broad external subject of *English*, you can assign these courses to it to help track your institution's English requirements. Use the School Course Classification page to record the specific course offerings for each subject area.

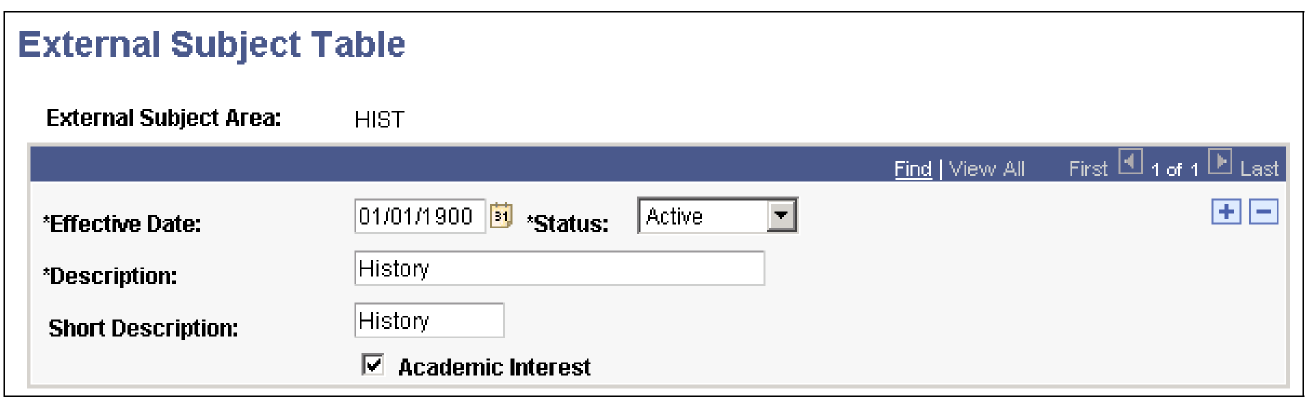
When you track information regarding external institutions for a prospect, applicant, or student, you should know the specific term to which that information is related. For example, when you enter external transcript or external transfer credit information, you should record the term to which the transcript information pertains. Because external institutions use various term structures, possible terms should be available to help identify that particular organization's term structure. Some external terms are redefined translate values. Review these values to verify whether they meet your institution's needs and create others if necessary. You can also set up how you want the system to convert external term sessions to your term structure.

Pages Used to Set Up External Subject Categories and Term Sessions

Page Name	***Definition Name***	***Navigation***	***Usage***
External Subject Table	EXT_SUBJECT_TBL	• Set Up SACR, Common Definitions, External Education, External Subjects • Campus Community, Organization, Define Organization Data, External Subject Table	Define broad categories of the subjects offered at external organizations.
External Term Table	EXTERNAL_TRM_TABLE	• Set Up SACR, Common Definitions, External Education, External Term • Campus Community, Organization, Define Organization Data, External Term	Define or review possible external terms sessions for external organizations.

Defining External Subject Categories

Access the External Subject Table page (Set Up SACR, Common Definitions, External Education, External Subjects).



External Subject Table page

Academic Interest

Select this check box to permit this code to be used as both an academic interest code and an external subject code.

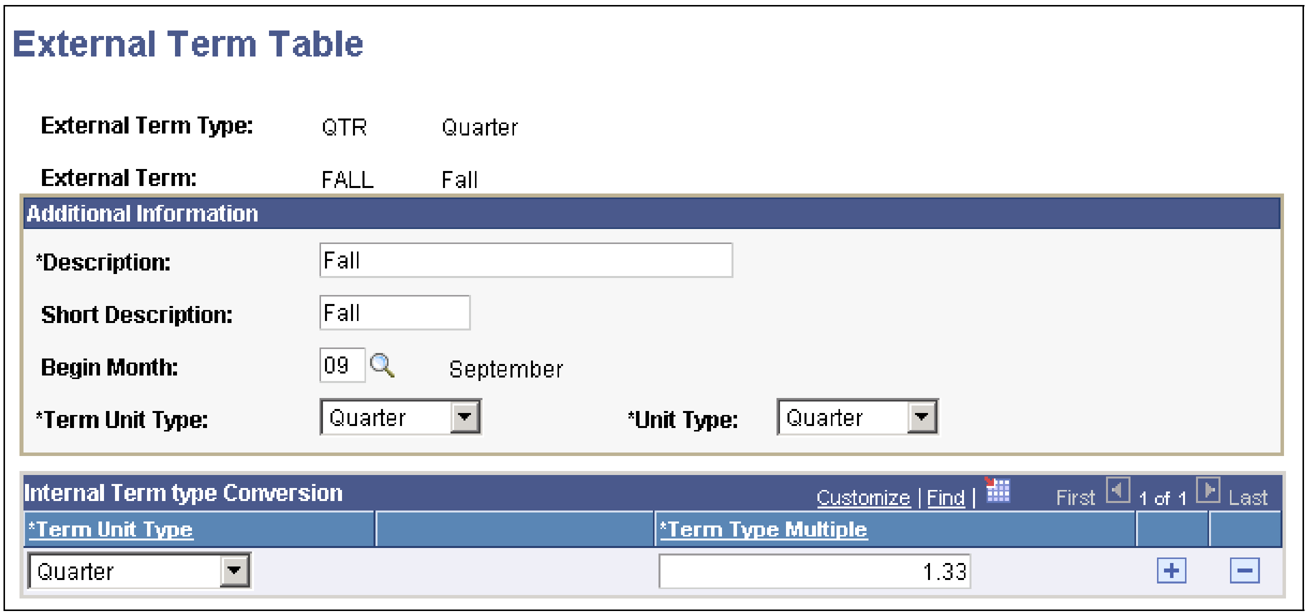
Academic interests are external subject areas in which a prospect or applicant has expressed interest that might not be offered by your program. If you want to record those interests for recruiting and analysis purposes, define them here.

When you enter external subjects for a prospect or applicant on the Education page, all codes defined in this table are available.

When you enter academic interests for a prospect or applicant on the Academic Interests page, only the codes that are defined as academic interests on this page are available.

Defining External Term Sessions

Access the External Term Table page (Set Up SACR, Common Definitions, External Education, External Term).



External Term Table page

Additional Information

Begin Month

Enter the month in which the external term begins.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Term Unit Type

Select the type of internal term unit that most closely correlates to this external term type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Unit Type

Select the credit or term type that further describes the correlation of this external term to your institution's term unit type.

PeopleSoft Recruiting and Admissions uses this field for information only. For example, they might want to describe the external term as having a Quarter term unit type with a unit type value of *No Credit.*

Values for this field are delivered with your system as translate values. You can modify these translate values.

Internal Term Type Conversion

Term Unit Type

Enter the external term unit type that you want the system to convert to an equivalent of the internal term unit.

Term Type Multiple

Enter the factor by which the system should multiply the external term unit type to convert it to an equivalent of the specified internal term unit type.

For example, the external term unit type of Quarter multiplied by a term type multiple of 1.33 might be the equivalent of your internal Semester term unit type. The system provides this conversion when calculating transfer credit for a manually assigned equivalent course.

Setting Up External Education Comments

To define default comments for external education data, use the External Education Comments component (SAD_EXT_COM_TBL).

Default comments that are defined on the External Education Comments page can be entered in the Education component, at the transcript level, career level, or for a specific course.

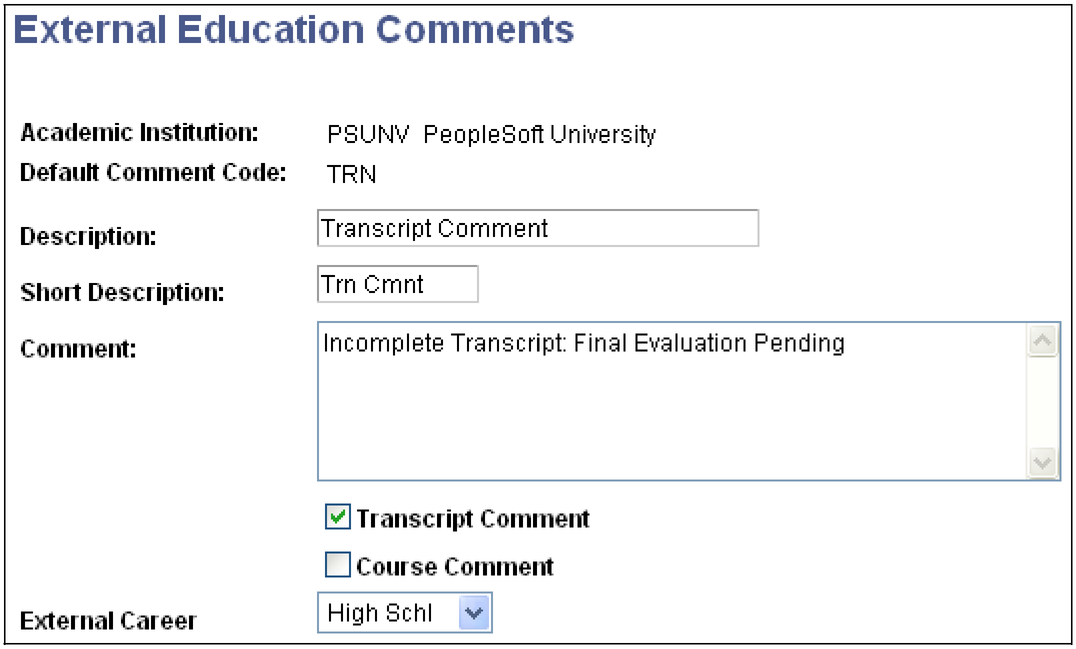
This section discusses how to define default comments.

Page Used to Define External Education Comments

Page Name	*Definition Name*	*Navigation*	*Usage*
External Education Comments	SAD_EXT_COM_TBL	Set Up SACR, Common Definitions, External Education, External Education Comments	Define default comments for external education data.

Defining External Education Comments

Access the External Education Comments page (Set Up SACR, Common Definitions, External Education, External Education Comments).



External Education Comments page

Default Comment Code

Enter a code for the default comment.

Description

Enter a description of the comment code.

Short Description

Enter an abbreviated description of the comment code.

Comment

Enter the default text for the comment.

Transcript Comment and **Course Comment**

Select to indicate that the default comment relates to a transcript or to a specific course.

External Career

Enter the external career to which the comment relates.

Setting Up Organization Types

To define an organization type, use the External Organization Type Table component (SCC_ORG_TYP_TB).

The External Organization Type Table page defines the business structure of an organization used by an institution such as Business, Non-Profit, School, Foundation, Knowledge or Other. It also sets up the dynamic links to the various pages that a user would complete for data entry for the organization type.

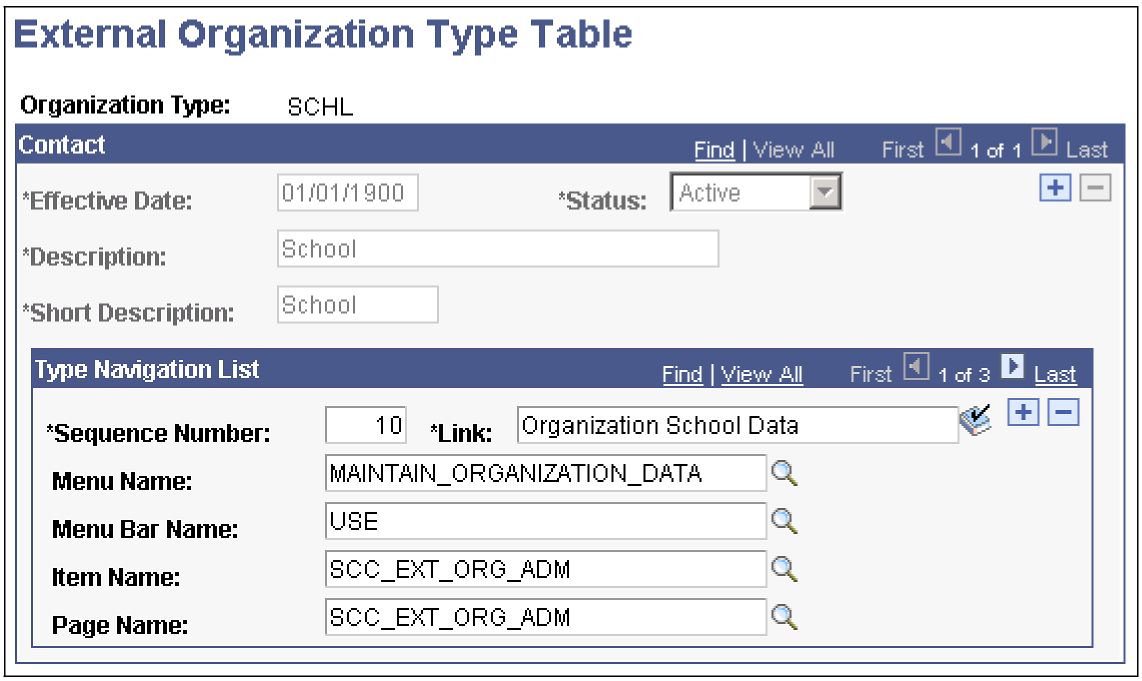
This section discusses how to define the organization type.

Page Used to Define the Organization Type

Page Name	*Definition Name*	*Navigation*	*Usage*
External Organization Type Table	SCC_ORG_TYP_TBL	Set Up SACR, Product Related, Campus Community, Organization Processing, External Organization Type	Define the organization type.

Defining the Organization Type

Access the External Organization Type Table page (Set Up SACR, Product Related, Campus Community, Organization Processing, External Organization Type).



External Organization Type Table page

Contact

Status

Displays *Active* to indicate that a particular organization type is available.

If your institution determined not to use the organization type *Inactive* displays.

Description

Enter a description of the organization type.

Short Description Enter an abbreviated description of the organization type.

Type Navigation List

Sequence Displays 10. This number can increase in increments of 10.

This specifies the position of the specified link as it appears on the EXT_ORG_TABLE page (the main page used for creating/maintaining external organizations). If an external organization type needs for you to complete multiple pages to specify all the information about a specific organization type, multiple dynamic links can be displayed to specify the pages necessary to complete the information. Therefore multiple sequence numbers are used to determine how the links appear.

Link Enter the name of the link.

This link appears in theOrganization Type Related group box on the Organization Table page.

Menu Name Enter the name of the menu name.

Menu Bar Name Enter the name of the menu bar.

Item Name Enter the item name.

Page Name Enter the page name.

Setting Up NAICS Codes

To define NAICS codes, use the NAICS Codes component (SCC_NAICS_TBL).

The North American Industry Classification System (NAICS) replaced the U.S. Standard Industrial Classification (SIC) system in 1997 and was revised in 2001 and again in 2002. It was developed jointly by the U.S., Canada, and Mexico to compare business activity statistics across North America. This North American code indicates the type of business that the external organization conducts such as manufacturing, staffing, education.

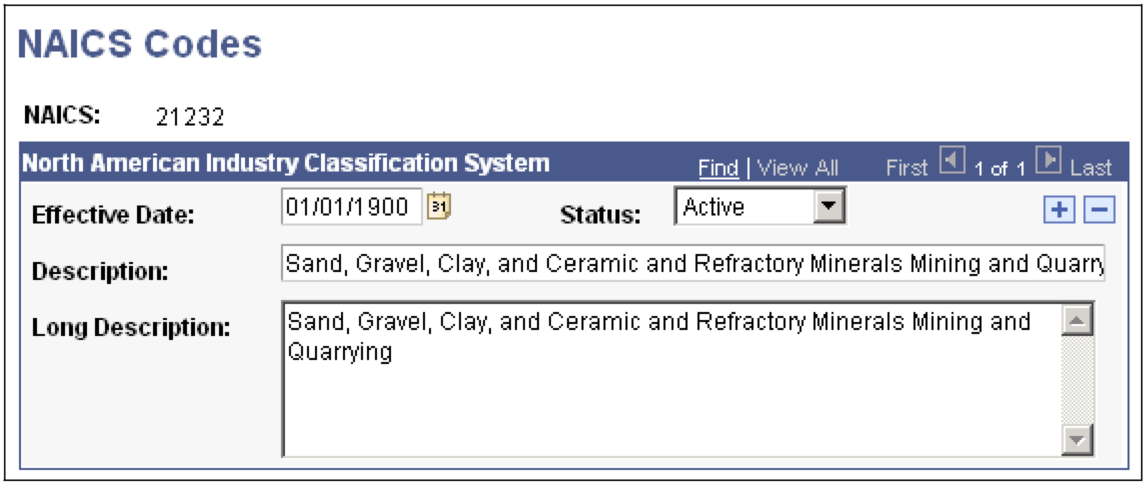
This section discusses how to define the NAICS codes.

Page Used to Define NAICS Codes

Page Name	Definition Name	Navigation	Usage
NAICS Codes	SCC_NAICS_TBL	Set Up SACR, Product Related, Campus Community, Organization Processing, NAICS Codes	Define the NAICS codes to specify the organization classification in the definition of the external organization.

Defining NAICS Codes

Access the NAICS Codes page (Set Up SACR, Product Related, Campus Community, Organization Processing, NAICS Codes).



NAICS Codes page

North American Industry Classification System

Status

Enter *Active.*

As these are government codes, in time, they could be replaced by a more specific code. In this instance, the code is *Inactive.*

Description

Enter a description of the code (for example, *21232* for Sand, Gravel, Clay and Ceramic and Refractory Minerals Mining and Quarrying or *236220* for Commercial Institutional Building Construction, or *236115* for New Single-Family Housing Construction (except Operative Builders).

Long Description

Enter a description.

A long description usually replicates the description of the code (for example, *Sand, Gravel, Clay and Ceramic and Refactory Minerals Mining and Quarrying* or *Commercial Institutional Building Construction,* or *New single-Family Housing Construction (except Operative Builders).*

Setting Up ATP Country Names and School Types

The ATP Load process (CCATPLOD.SQR) picks up country names and school types that are delivered in the American Testing Program (ATP) Secondary School data file load.

This section discusses the components that enable you to:

- Map ATP country names.
- Map ATP school types.

Note. The components are not delivered with values. You need to add rows to map the ATP and PeopleSoft values.

Pages Used to Set Up ATP Country Names and School Types

Page Name	*Definition Name*	*Navigation*	*Usage*
ATP Country Table	SCC_ATP_CNTRY_TBL	Set Up SACR, Product Related, Campus Community, Organization Processing, ATP Country Table	Map the ATP country names to the corresponding PeopleSoft country codes.
ATP School Type Table	SCC_ATP_SCH_TYPE	Set Up SACR, Product Related, Campus Community, Organization Processing, ATP School Type Table	Map the ATP school types to the corresponding PeopleSoft LS school types.

Mapping ATP Country Names

Access the ATP Country Table page (Set Up SACR, Product Related, Campus Community, Organization Processing, ATP Country Table).

ATP Country Table

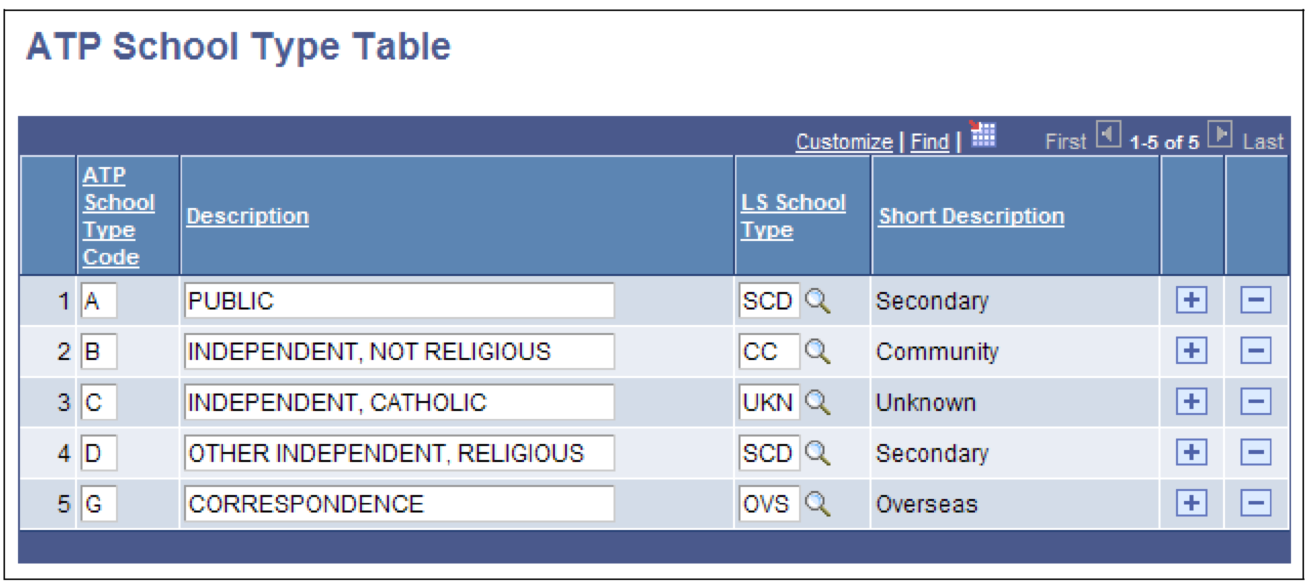
Customize | Find | First 1-8 of 8 Last

	ATP Country Name	Country	Description
1	ANGOLA	AGO	Angola
2	ARGENTINA	ARG	Argentina
3	AUSTRALIA	AUS	Australia
4	BENIN	BEN	Benin
5	CANADA	CAN	Canada
6	COTE D'IVOIRE-IVORY COAST	CIV	Cote D'Ivoire
7	FRANCE	FRA	France
8	MALAYSIA	MYS	Malaysia

ATP Country Table page

Mapping ATP School Types

Access the ATP School Type Table (Set Up SACR, Product Related, Campus Community, Organization Processing, ATP School Type Table).



ATP School Type Table

Customize | Find | First 1-5 of 5 Last

	ATP School Type Code	Description	LS School Type	Short Description
1	A	PUBLIC	SCD	Secondary
2	B	INDEPENDENT, NOT RELIGIOUS	CC	Community
3	C	INDEPENDENT, CATHOLIC	UKN	Unknown
4	D	OTHER INDEPENDENT, RELIGIOUS	SCD	Secondary
5	G	CORRESPONDENCE	OVS	Overseas

ATP School Type Table

For information on setting up LS School Types, refer to *PeopleSoft Recruiting and Admissions 9.0 PeopleBook*, "Setting Up Prospects", Setting Up School Types.

Chapter 17

Setting Up Administrative Functions

To set up or review administrative functions and their variable data, use the Administrative Function Table component (ADMIN_FUNCTION_TBL).

This chapter provides an overview of administrative functions and discusses how to:

- Review administrative functions.
- Determine variable data fields.

Understanding Administrative Functions

Administrative functions identify the variable data or key fields associated with specific functions in the higher education environment. Throughout your system, when you select a function, the associated fields or data for that function become available. With this feature, PeopleSoft helps you to ensure consistency between all records within a similar functional area across your institution. Administrative functions are also especially useful for extracting relevant data for generating letters and other communications within a specific functional area.

Warning! PeopleSoft delivers predefined administrative functions on the Administrative Functions Table. You should *not* modify the delivered administrative functions. You can add administrative functions; however extensive system configuration is required to do so.

This table lists the administrative functions (and their respective codes) and variable data fields that are delivered in your system.

Code	***Administrative Function***	***Variable Data Fields***
ADMA	Admissions Application [Application Level]	• Academic Career • Student Career Number • Application Number

Code	***Administrative Function***	***Variable Data Fields***
ADMP	Admissions Program [Program Level]	• Academic Career • Student Career Number • Application Number • Application Program Number
AVAK	Advancement Acknowledgements	• Designation Code • Gift Number • Initiative Code • Recognition Type • Session Number
AVIN	Advancement Initiatives	• Audience Code • Audience Type • Initiative Code
AVMB	Advancement Membership Benefits	• Member Payment Number • Standard Benefit
AVMS	Advancement Membership	• Membership Number • Membership Organization Code
AWRD	Awarding	• Academic Career • Aid Year • Item Type
BDGT	Budget Maintenance	• Academic Career • Aid year • Effective Date (FINA) • Term

Code	*Administrative Function*	*Variable Data Fields*
EVNT	Event	• Event ID • Meeting Number (optional)
FINA	Financial Aid	Aid Year
GEN	General	None
IHC	International Health Coverage	Coverage Number
ISIR	ISIR Corrections	• Aid Year • Effective Date (FINA) • Effective Sequence (FINA)
LOAN	Loan	• Aid Year • Loan Type Code • Application Sequence
NLBP	Internships NLD	Internal Contract
NLOW	Educational contracts NLD	Contract Number
PROP	Prospect Program	• Academic Career • Academic Program • Recruiting Center
PROS	Prospect	Academic Career
PSSV	Prospect Self Service	Academic Career
RECR	Recruiters	Academic Career
RSTR	Restricted Aid	• Aid year • Restricted Aid ID

Code	***Administrative Function***	***Variable Data Fields***
SENR	Student Enrollment	• Academic Career • Class Number • Academic Term
SFAC	Student Financials Account	• Business Unit • Account Number • Account Term
SFBI	Student Financials Billing	• Business Unit • Invoice ID
SFCO	Student Financials Collections	• Business Unit • Collection ID
SFGR	Student Financials Groups	• Business Unit • Group ID
SFIT	Student Financials Item Lines	• Business Unit • Item Number • Line Sequence Number
SFPA	Student Financials Payments	• Business Unit • Payment ID Number
SFPR	Student Financials Promise	Checklist Date Time
SFRC	Student Financials Receipt	• Business Unit • Cashier's Office • Receipt Number

Code	Administrative Function	Variable Data Fields
SFRF	Student Financials Refund	• Business Unit • Refund Number
SFTP	Student Financials Contracts	• Business Unit • Contract Number
SPRG	Student Program	• Academic Career • Career Number
STRM	Student Term	• Academic Career • Academic Term

Reviewing Administrative Functions

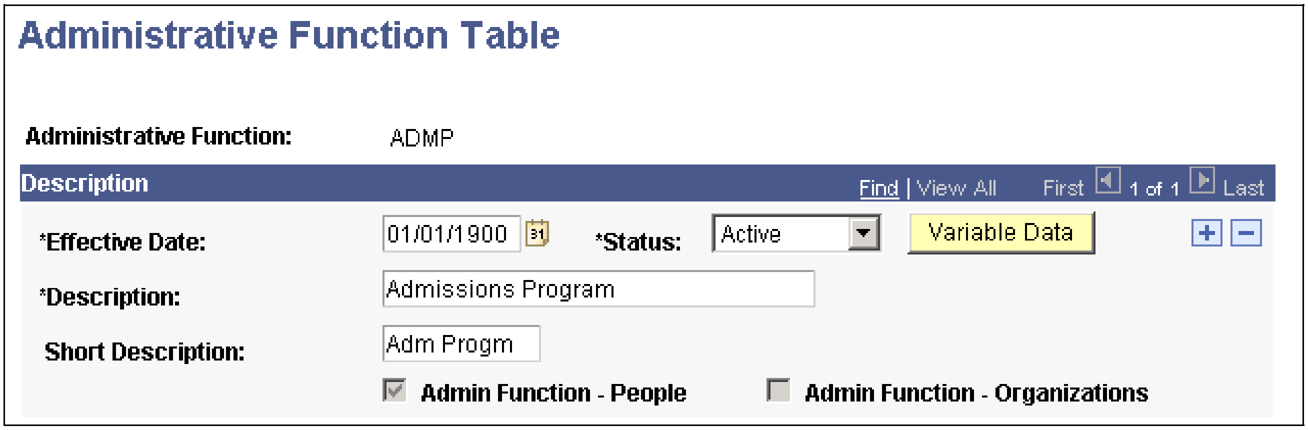
This section discusses how to review administrative function codes.

Page Used to Review Administrative Functions

Page Name	Definition Name	Navigation	Usage
Administrative Function Table	ADM_FUNCTION_TABLE	Set Up SACR, Common Definitions, Administrative Function Table	Review administrative functions.

Reviewing Administrative Function Codes

Access the Administrative Function Table page (Set Up SACR, Common Definitions, Administrative Function Table).



Administrative Function Table page

Variable Data — Click this button to access the Administrative Function Field Usage page, on which you can view a list of all the variable data fields associated with this function.

Admin Function - People or **Admin Function - Organizations** — The system selects these check boxes to indicate whether the function relates to individuals or to organizations in your database.

Determining Variable Data Fields

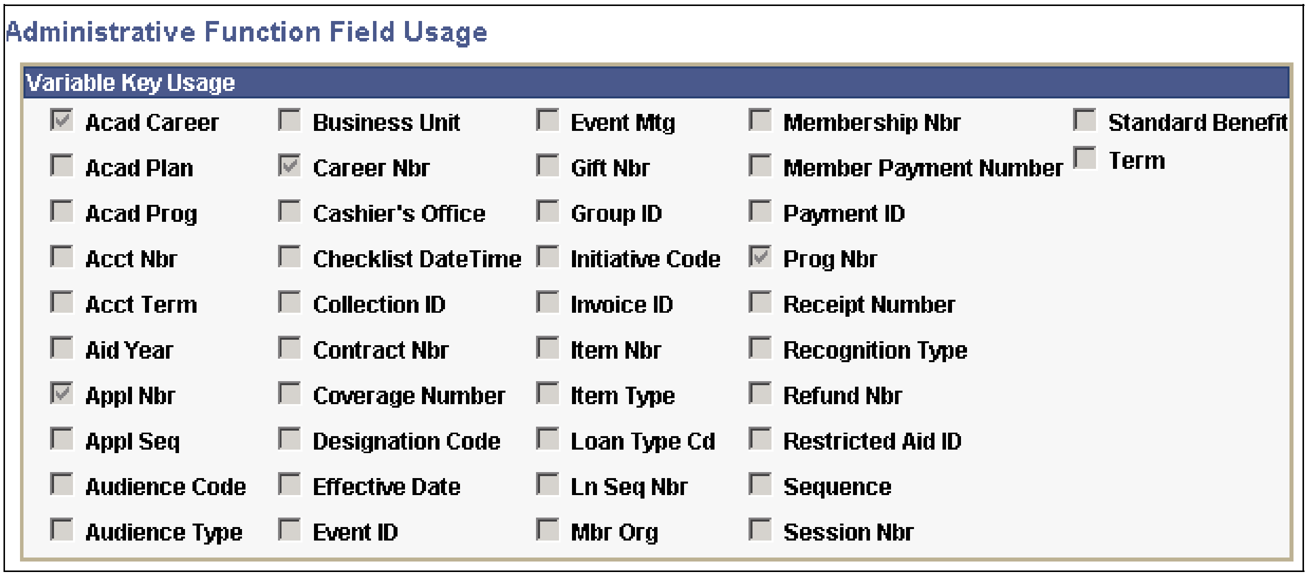
This section discusses how to determine the data fields associated with a function.

Page Used to Determine Variable Data Fields

Page Name	*Definition Name*	*Navigation*	*Usage*
Administrative Function Field Usage	ADM_FUNCTION_SP	Click the Variable Data button on the Administrative Functions Table page.	View fields associated with an administrative function.

Viewing Variable Data Fields Associated with a Function

Access the Administrative Function Field Usage page (click the Variable Data button on the Administrative Functions Table page).



Administrative Function Field Usage page

A selected check box indicates that the item is variable data for that administrative function. Administrative functions are shipped with their variable data preassigned. Any modification to these selections could require substantial programming effort.

Chapter 18

Setting Up the Population Selection Process

This chapter provides an overview of population selection and discusses how to:

- Set up selection tools.
- Define and map contexts.

Understanding Population Selection

Population selection enables you to use different tools to select IDs for a process. You can use a PS query, equation engine equation, or flat file or delimited file as a selection tool, or you can create other tools, to control which fields and records to use to identify the population. When you set up the tool in your system, you identify how many result rows to return and whether you want users to be able to preview results before running the process. Using contexts, you identify the processes for which the Population Selection feature will be available. Using context mapping, you can see which fields are mandatory or optional for the process. Inside the context, you also grant selection tool security to users.

Note. The PeopleSoft system delivers functionality for using PS queries, the equation engine, and external files as selection tools. You can create other tools, but they will require significant programming effort.

Setting Up Selection Tools

To set up selection tools, use the Selection Tool component (SCCPS_TOOL_DFN).

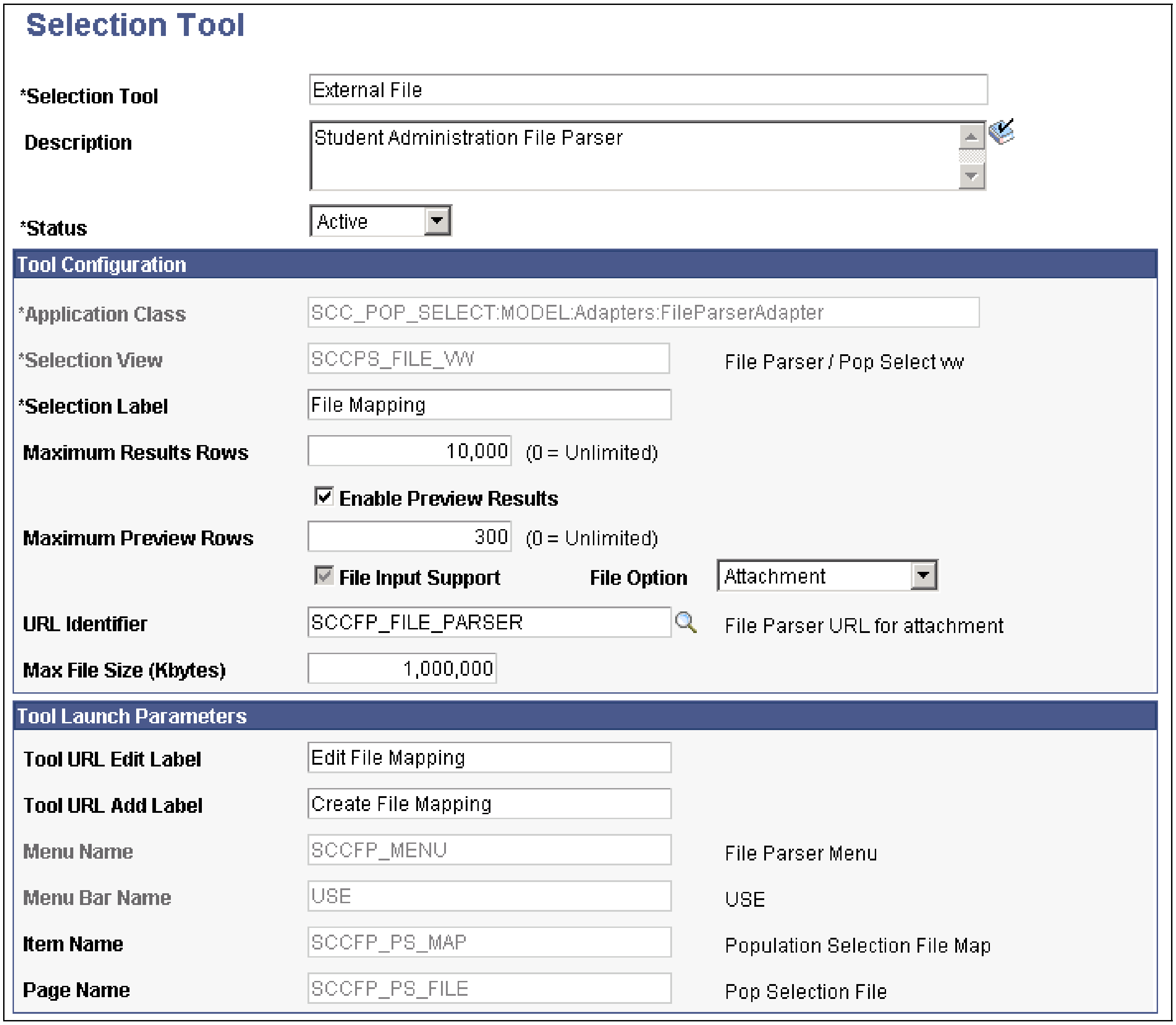
This section discusses how to set up selection tools.

Page Used to Set Up Selection Tools

Page Name	Definition Name	Navigation	Usage
Selection Tool	SCCPS_TOOL_DFN	Set Up SACR, System Administration, Utilities, Population Selection, Selection Tool	Identify and configure the selection tools (PS query, equation engine equation, and external file) to make available for population selection.

Setting Up a Selection Tool

Access the Selection Tool page (Set Up SACR, System Administration, Utilities, Population Selection, Selection Tool).



Selection Tool page

Values on the Selection Tool page determine which selection tools will be available from the Population Selection subpage throughout PeopleSoft Campus Solutions and how they will appear and behave.

Selection Tool

Displays the type of tool *(Equation Engine,PS Query*, or *External File)* that you are configuring.

You can rename a selection tool. If you do, consider using a name that reflects the tool. Internal sequencing preserves the tool type for system use. For example, if you rename *External File* to *Spreadsheet,* the internal sequencing remains. Therefore, the system displays the appropriate fields and links for an external file when the user selects *Spreadsheet.*

Warning! The Population Selection process has limitations when using the external file selection tool on the OS/390 and z/OS operating systems. Files created in a different character set than the character set for the operating system on which process scheduler runs might not be processed. For example, an ASCII delimited file created in the Microsoft Windows environment cannot be processed on an EBCDIC-based OS/390 or z/OS process scheduler. The file may be processed on a NT or Unix (non-EBCDIC) process scheduler.

Status

The default status for each tool is *Active.*

If your institution does not want to use or make a tool available for use, change the status of the tool to *Inactive.*

Only active tools are available for selection in the Context Definition component.

Tool Configuration

Values in this area identify the prompt sources and file destinations for a tool and the maximum results to process at a time. They also control which labels and links to use in the Population Selection group box.

Application Class and **Selection View**

Display the name of the application class delivered for the specific tool type and the view to use as the prompt from that application class. Application classes and views are predefined for delivered selection tools, and you cannot change them.

For the equation engine tool, the Application Class is *SCC_POP_SELECT:MODEL:Adapters:EqtEngAdapter* and the Selection View is *SCCPS_EQTN_VW.*

For the query tool, the Application Class is *SCC_POP_SELECT:MODEL:Adapters:PSQueryAdapter* and the Selection View is *SCCPS_PSQRY_VW.*

For the external file tool, the Application Class is *SCC_POP_SELECT:MODEL:Adapters:FileParserAdapter* and the Selection View is *SCCPS_FILE_VW.*

Selection Label	Displays the text to use as the field label in the Population Selection group box for the prompt containing values for that selection tool. For the equation engine tool, the default text is *Equation Name.* For the query tool, the default text is *Query Name.* For the external file tool, the default text is *File Mapping.* You can change the default text.
Maximum Results Rows	Displays the maximum number of results rows to return. To control processing time, if the selection process returns more than the recommended maximum number of IDs, the process will not process the extra IDs. You can change the maximum number. For the equation engine tool, the recommended maximum is *100,000.* For the query tool, the recommended maximum is *50,000.* For the external file tool, the recommended maximum is *10,000.*
Enable Preview Results and **Maximum Preview Rows**	Control whether the Preview Selection Results link appears on the Population Selection subpage. As delivered, this check box is selected, which causes the link to appear. When clicked, the system displays a preview of the results retrieved by the tool. You can change the maximum number of rows that appear in the preview. If your institution does not want to use the results preview, clear the check box. When the check box is cleared, the Maximum Preview Rows field is hidden.
File Input Support and **File Option**	These fields apply to external file tool only. The File Input Support check box is delivered turned on only for the external file tool, causing the File Option field to appear. You must select whether your institution wants to provide external files to the system by *Attachment* or by *Physical Path.* The default value, which is *Attachment*, is recommended. You can specify in the URL Identifier field, where the system should place attachments for the tool so that PeopleSoft Applications Engine and Process Scheduler can access them. If you select *Physical Path,*users must enter the physical file path in the Population Selection group box located on the run control page. Both the Applications Engine and Process Scheduler must be able to access this path.

URL Identifier	If you select the *Attachment* file option, you must enter the PeopleTools URL that identifies where PeopleTools should place attachments for this tool so that the Applications Engine and Process Scheduler can access it. The URL can point to an FTP server or a physical table. The PeopleSoft system delivers an external file tool that points to a PeopleTools URL named SCCFP_FILE_PARSER. This URL is configured to write attachments to a table named SCCFP_FILE_ATT. See *PeopleTools: PeopleCode Developer's Guide*, "Understanding File Attachments and PeopleCode"
Max File Size (Kbytes) (maximum file size [kilobytes])	Displays, in kilobytes, the maximum file size that you permit users to upload. Applies to the external file selection tool only.

Tool Launch Parameters

Values in this area control where users are to be redirected from links in the Population Selection group box.

Tool URL Edit Label and **Tool URL Add Label**	Enter text to use as a link to redirect users to where they can edit an existing query, equation, or file mapping (Tool URL Edit Label) and add a new query, equation, or file mapping (Tool URL Add Label).
Menu Name, Menu Bar Name, Item Name, and **Page Name**	For each of the delivered selection tools (equation engine, query, and external file), these parameters are predefined and cannot be modified. The system displays their values for your information and reference only. If you were creating a new tool, these fields would be available for you to complete.

Defining and Mapping Contexts

To define and map contexts, use the Application Specific Context (SCCPS_VARY_MAP), Context Definition (SCCPS_CNTXT_DFN), and Equation to Context Mapping (SCCPS_EQTCTXT_MAP) components.

This section discusses how to:

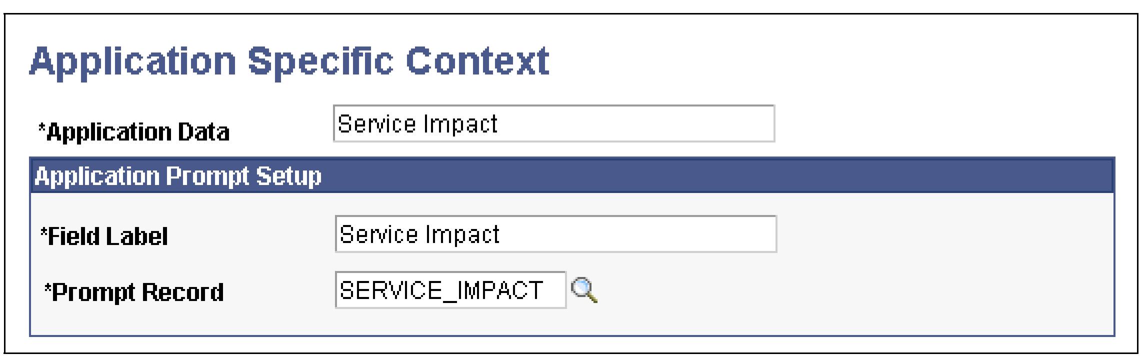
- Define an application-specific context.
- Define a context.
- Map a context definition to the Population Selection process.
- Map an equation to a context.

Pages Used to Define and Map Contexts

Page Name	*Definition Name*	*Navigation*	*Usage*
Application Specific Context	SCCPS_VARY_MAP	Set Up SACR, System Administration, Utilities, Population Selection, Application Specific Context	Identify the application keys to use to map a context to a specific process.
Context Definition	SCCPS_CNTXT_DFN	Set Up SACR, System Administration, Utilities, Population Selection, Context Definition	For a specific process, define which menu navigation should allow the Population Selection process to be used. Select the Selection Tools to make available for the process and grant users security to them.
Selection Mapping	SCCPS_CNTXT_MAP	Set Up SACR, System Administration, Utilities, Population Selection, Context Definition, Selection Mapping	Map the fields required for a process with the process results fields (not all results fields are required).
Equation to Context Mapping	SCCPS_EQTCTXT_MAP	Set Up SACR, System Administration, Utilities, Population Selection, Equation to Context Mapping	Map an equation to a Population Selection context.

Defining an Application-Specific Context

Access the Application Specific Context page (Set Up SACR, System Administration, Utilities, Population Selection, Application Specific Context).



Application Specific Context page

An application-specific context is required when different field values require different fields and records to run a process. For example, the 3C Engine process requires different fields and records to extract the proper variable data based on the administrative function selected. The ADMA administrative function requires a set of fields different from those required by the AVIN administrative function.

You can define the key field and prompt record to use for a specific application before mapping the application to the Population Selection process.

The PeopleSoft system delivers three predefined application-specific contexts: *Administrative Function, Membership Type,* and *Population Update.* These application specific contexts map key values to the appropriate prompt record for the business process. You cannot change the predefined application-specific contexts, but you can create new ones.

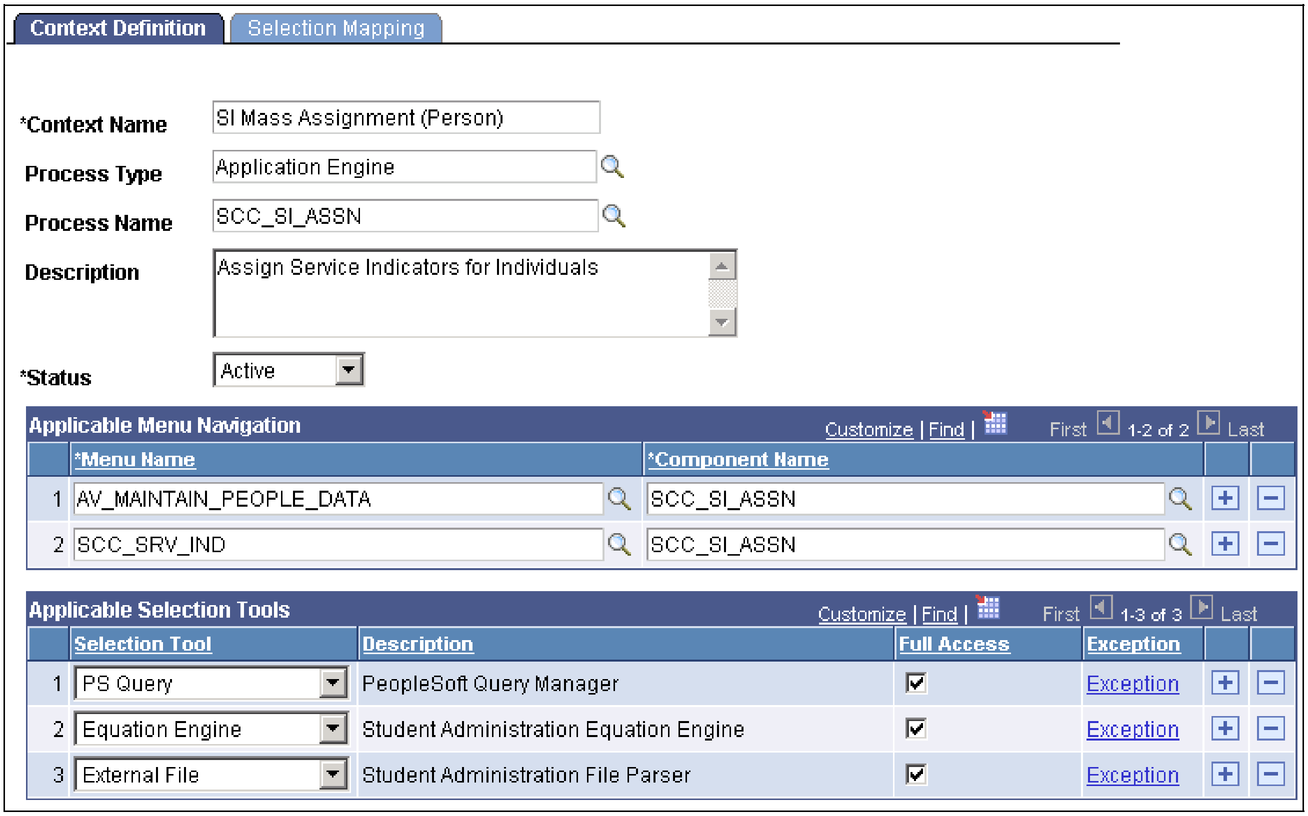
Application Data	Identify the specific application data name.

Application Prompt Setup

Field Label	Enter the field to use as the key field for selecting IDs for that application.
Prompt Record	Enter the record to use to prompt for values for the key field.

Defining a Context

Access the Context Definition page (Set Up SACR, System Administration, Utilities, Population Selection, Context Definition).



Context Definition page

Use contexts to associate population selection with a specific process and to make the Population Selection group box available on the run control page for that process.

Context Name	Enter a name for the context that you are defining.
Process Type	Enter the type of process to associate with this context.
Process Name	Enter the name of the process. Only the processes of the specified process type are available.

Applicable Menu Navigation

Menu Name and **Component Name**

Identify the menus and components where the run control page for the process is located.

Note. The PeopleSoft system delivers some processes, such as the Mass Assign Service Indicator process, set to use only the Population Selection feature to select the IDs to process. If the process you select is one of those, all the menu and component names where the process is used are listed. For other processes, such as the 3C Engine process, where the Population Selection feature is not required and you have more than one choice of methods for selecting the IDs to process, list only the menus and components where you want to make the Population Selection feature available as choice for users.

Applicable Selection Tools

Selection Tool

Enter the selection tools to allow for this process.

The selection tools that you specify will be the only selection tools available in the Selection Tool prompt in the Population Selection group box for this process. The order in which you enter the tools in the context is the order in which they will appear in the drop-down list box. If you want to encourage the use of one tool over another, consider entering them in the order of preference.

Full Access and **Exception**

The choices that you make here, control the selection tools in the Population Selection group box that are accessible to users.

Select the Full Accesscheck box to give all users access to the tool. For example, if you select the *PS Query* tool and the Full Accesscheck box, all users are able to use the PS Query selection tool from the Population Selection group box for this process.

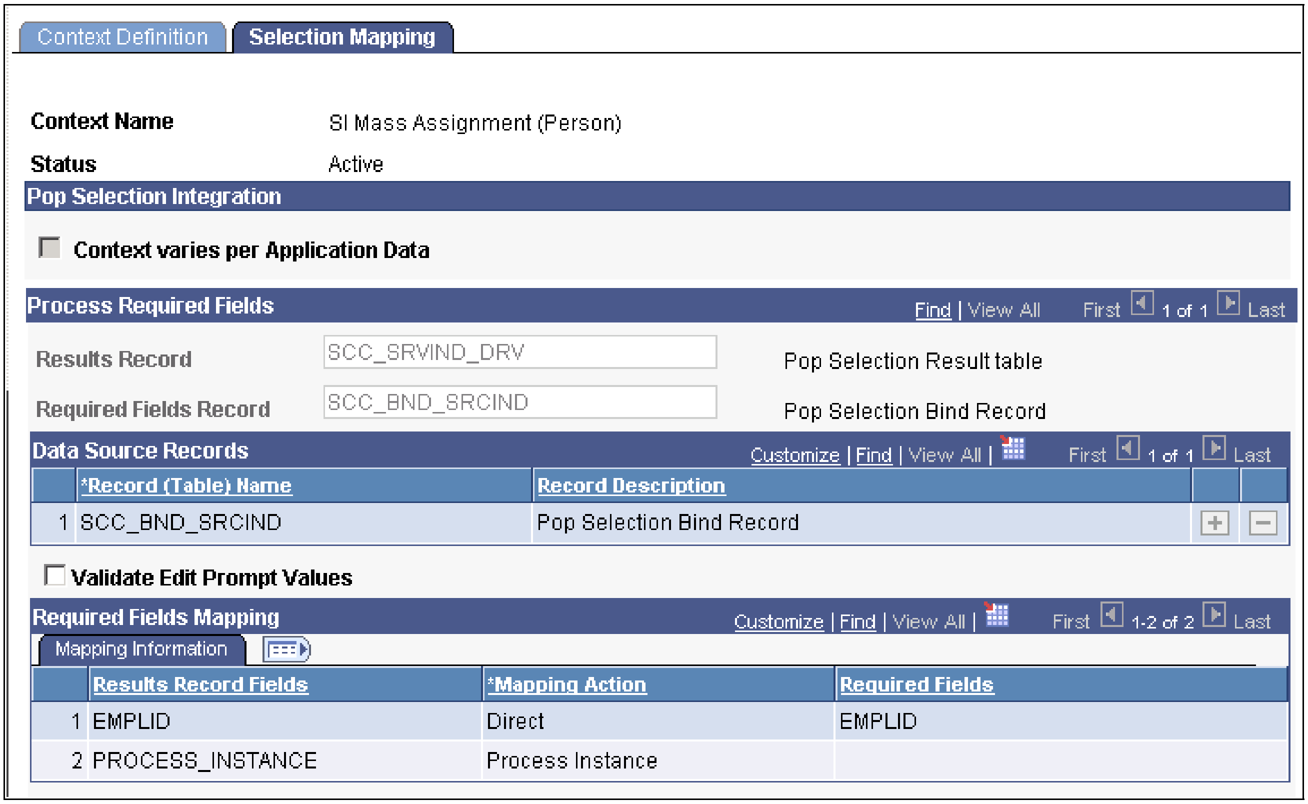
If the number of users to whom you want to give full access to the tool is greater than the number of users to whom you do not want to grant full access, select the Full Access check box and then click the Exception link to specify those users who should not have full access.

If the number of users to whom you want to give limited access to the tool is greater than the number of users to whom you want to give full access, clear the Full Access check box and then click the Exception link to specify those users who should have full access.

Note. If you do not want to provide anyone with access to this tool, delete the row.

Mapping a Context Definition to the Population Selection Process

Access the Selection Mapping page (Set Up SACR, System Administration, Utilities, Population Selection, Selection Mapping).



Selection Mapping page

A context must be mapped to control how the results records are populated. Delivered contexts are pre-mapped; therefore, case values on the Selection Mapping page are display only. If your institution creates a new context definition, the fields for mapping that context are available for entry.

Pop Selection Integration

Context varies per Application Data

When selected, the Application Data field appears and values defined on the Application Specific Context page are available in the prompt list.

Application Data

Select the application data to use.

Delivered values are:

(Blank)

Administrative Function

Membership Type

Population Update

Process Required Fields

In this section, the system displays the values for which required fields and records vary for the context. For example, the 3C Engine uses Administrative Function application data. The Population Selection context for the 3C Engine process needs subcontexts for each of the administrative function values. Each value requires different fields and records based on the variable data fields. The system displays the results records and required fields record for the administrative function.

Administrative Function, Membership Type, or **Population Update**

If the Context varies per Application Data check box is selected, a field appears in this section based on the associated Application Data value. For example, when the Application Data field is set to *Administrative Function,* the Administration Function field appears. If the Application Data field is set to *Membership Type,* for PeopleSoft Contributor Relations, then the Membership Type field appears. If the Application Data field is set to *Population Update,* the Population Update field appears.

Results Record

Displays the results record that contains all of the fields that are required for the process to run.

When integrating the Population Selection feature into a process, the system uses the results record to map values extracted by the Population Selection process to the required fields.

Required Fields Record

Displays the name of the bind record that contains the fields that are required for the application process to select IDs.

The Population Selection process must extract data for these required fields. Therefore, any Equation Engine equation, PS Query, or external file created to select the IDs for the process must include the record listed here.

Note. Each delivered application process into which the Population Selection process has been integrated, includes a corresponding sample PS_Query prefixed with QA_CS_xx where *xx* is the product code.

Data Source Records

The Population Selection process selects IDs based on the required fields in the bind record and places the values in the results record for the application process. The Population Selection process selects from the resulting IDs, which are the IDs that qualify based on the required and optional fields specified within the selection tool. These required and optional fields are the fields in the data source bind record that you specify.

When using PS Query, you must specify a data source record within the query for the query to be valid for the Population Selection process. When the user selects the selection tool of *PS Query* from the standard Population Selection group box, only the queries created with the associated data source record are available.

The data source record is the same as the required field record except where more than one data source record is required. or when the required fields record includes fields that are not relevant for selection by PS Query.

Two data sources are required when data must be pulled from two tables with the same data type but where the tables cannot be joined because they do not have the same rows. When you run a process set to select both people and organization IDs, you will likely need two data source records because the people data is in one table and the organization data is in another.

The required fields record might contain a comments field, however, a comments field is usually not relevant for selection by PS Query. In that case the corresponding data source record should not include the comments field and would therefore be different from the required fields record. If you use the external file selection tool, the comments field is selected as an optional field.

You can create an Equation Engine equation using the data source record, but it is not mandatory.

Record (Table) Name Enter the records that contain the fields for the Population Selection process to use to select only the desired IDs.

Validate Edit Prompt Values Select this check box to validate prompt values in a query or equation against the same values on the process run control page. This selection will prevent the Population Selection process from selecting IDs with values that are different from values on the run control page.

For example, if the run control page includes the Institution field, and the query or equation includes a prompt for the Institution field, the Population Selection process will select only those IDs whose values are the same.

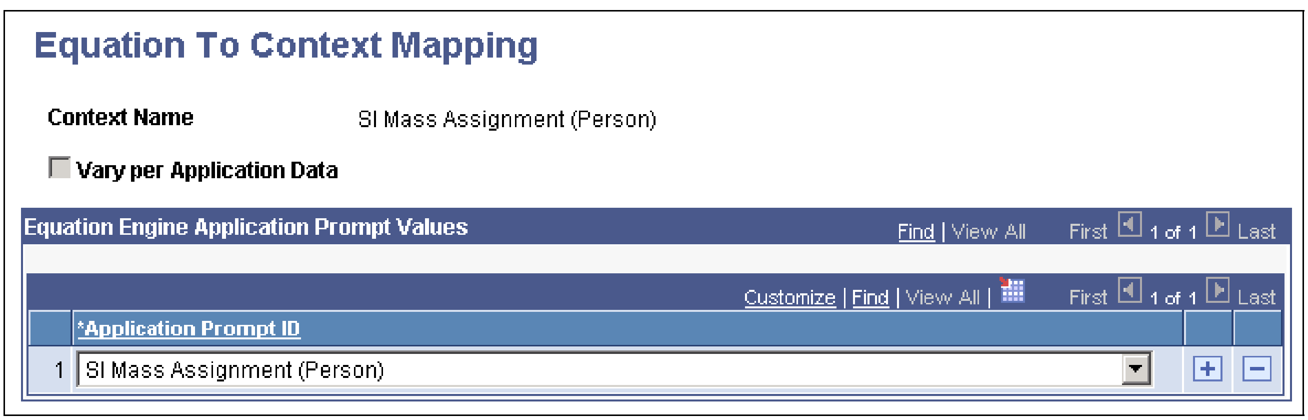
If the prompt value is blank, the system provides the value from the run control page.

Required Fields Mapping

Results Records Fields The system lists each field on the specified results record. It displays how each field from the Required Fields Record selected is set to be mapped .

Mapping an Equation to a Context

Access the Equation To Context Mapping page (Set Up SACR, System Administration, Utilities, Population Selection, Equation to Context Mapping).



Equation To Context Mapping page

This page is applicable only when the selection tool is Equation Engine.

Equations are segmented by an attribute called an *Application Prompt.* Enter the application prompts that separate the equations for a context. Only the application prompts associated with the context are available.

When you select the selection tool of *Equation Engine* on a run control page, only the equations with the application prompt that you select here, are available. For example, if you enter the Application Prompt ID of *SI Mass Assignment (Person),* then only the equations with that application prompt are available on the SI Mass Assignment run control page.

Chapter 19

Using the File Parser Process

At the time of publication of this PeopleBook, the latest version of the Using the File Parser Process chapter is available on the following My Oracle Support page, as part of the Campus Community documentation package for Bundle 24:

CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 [ID 1400708.1]

Chapter 20

Using Constituent Web Services

This document provides an overview of constituent web services, lists prerequisites, and discusses:

- Outbound and inbound services.
- Configuring constituent event triggers.
- Configuring notification handlers.
- Configuring integration with external systems.

Note. If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing how to configure and use External Search/Match directly between the two systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide, posted to My Oracle Support

PeopleTools: Integration Broker

Understanding Constituent Web Services

In general, a web service is a collection of operations that enable software to utilize a resource. The official web service definition can describe almost any standard for exchanging data over the internet, but in common usage the term refers to the exchange of XML messages that follow the SOAP standard using the same HTTP protocol as a web browser. A simple definition of a web service is an internet application programming interface (API) that is self-describing and can work between various programming languages. The constituent web service was developed to be used in a manner consistent with common web services.

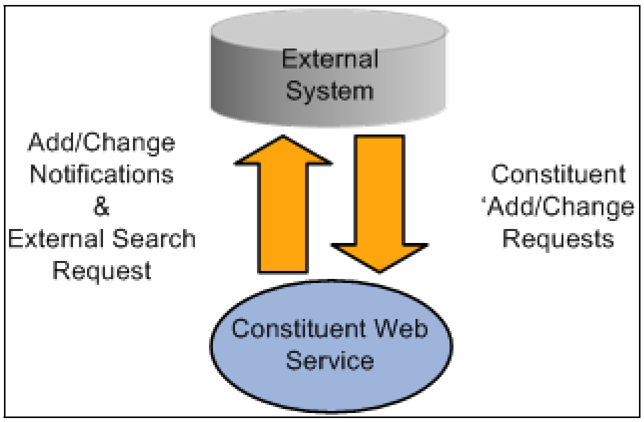
The constituent web service manages information about a constituent. A constituent can be a prospect, applicant, student, faculty member, or any other person of interest to your institution. The web service allows the Campus Solutions database to communicate with virtually any other external system, regardless of the technology supporting that system. Prior to web service standards it was difficult to connect systems on disparate technologies, such as operating systems, database platforms, and application architectures. Web service standards make it possible for computer systems on virtually any technology platform to integrate with minimal effort.

Institutions can use constituent web services to integrate constituent data between Campus Solutions and other external systems. The constituent web service:

- Notifies integrated systems when new constituents in Campus Solutions are created or when their information is changed.

  External systems can use this notification to synchronize their version of the constituent or to perform processing based on the changed data.

- Allows integrated systems to update a constituent's information in Campus Solutions, such as adding a new address or changing the constituent's name.
- Allows integrated systems to retrieve a constituent's detailed information.
- Enables Campus Solutions users to run Search/Match against an external constituent repository, such as a data hub.



Constituent web service information flow

Institutions can use the web service to integrate to a variety of administrative and academic systems that comprise the higher education ecosystem. For example, the service can be used to integrate to a data hub (MDM), housing system, human resources, parking system, learning management system, and general purpose registry. Large institutions often deploy hundreds of such systems.

Messaging between the systems is done via synchronous or asynchronous interactions. In a synchronous interaction, the source system issues a request to the target system and then waits until a response is received. Asynchronous interactions involve the source system issuing a request to the target system and not waiting for any response, but instead immediately continuing with processing. The request is assumed to have been received by the target system and to have been processed successfully. Asynchronous requests do not receive a response from the target system. This model assumes that the underlying messaging middleware guarantees the delivery of the request to the target system.

The *PeopleSoft Campus Solutions Constituent Web Services Developer's Guide* provides the technical details of web services as well as configuration and messaging.

The data that comprises the constituent message includes the core person data contained in the PERSON_BASIC_SYNC message, the Campus Solutions extension data contained in the PERSON_SA message, and affiliations data.

Messaging

Constituent web services uses three types of messaging. The system generates outbound messages when a constituent's data is changed in either Campus Solutions or HRMS (if the institution uses a combined instance of HCM/CS). A change in any data element in the constituent message definition raises this condition. The system publishes the constituent message so that any interested external system can be informed. The system generates inbound messages when a constituent's data is updated in an external system that is integrated with Campus Solutions. When a third-party or external system needs to query the Campus Solutions database to view data, the system generates a query message. This is a synchronous inbound request/response *get* service, in which a third party raises a query or data request and the Campus Solutions system delivers a response that contains the requested data details.

Constituent web services delivers the following messages, which are defined using PeopleTools Integration Broker:

- SCC_CONSTITUENT_SYNC (Outbound)
- SCC_PERSON_SYNC (Outbound)
- SCC_CONSTITUENT_IN_SYNC_DS (Inbound)
- SCC_GET_CONSTITUENT_REQ_DS (Inbound)
- SCC_GET_CONSTITUENT_RES_DS (Query)

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide, posted to My Oracle Support https://support.oracle.com

Prerequisites

Before using constituent web services, your application server must be configured such that the publish/subscribe servers are running, and domains and gateways are configured.

In addition, in order to use the PERSON_DATA queue for web services, configure the Queue Definitions page so that the PERSON_DATA Queue Status is set to *Run.*

You must also configure the integration gateway using Integration Broker.

See Also

PeopleTools: Integration Broker

Outbound and Inbound Services

The PeopleSoft system delivers three outbound and two inbound web service operations. The *PeopleSoft Campus Solutions Constituent Web Services Developer's Guide* contains details about these services as well as samples of the XML messages that the services generate.

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide, posted to My Oracle Support https://support.oracle.com

Outbound Services

The PeopleSoft system delivers three outbound service operations to notify external systems of changes to Campus Solutions constituent data, search/match for constituents in external repositories, and read ("get") constituent details for a single constituent in an external source.

Constituent Message

Use this operation to notify third parties of the creation, update, or deletion of one or more constituents in the Campus Solutions system. An outbound constituent request is sent whenever a constituent's data is updated. This includes information change by self-service users, administrators, and batch programs (for example, ISIR load).

The notification is sent whenever an administrator accesses any of these person create/update entry points:

- Campus Community – Personal Information
- Campus Community – Personal Information (Student)
- Contributor Relations – Add/Update a Person
- Student Recruiting – Add a Prospect
- Records and Enrollment – Quick Admit
- Student Admission – Application Entry
- Workforce Administration – Add a Person (if the institution is using a combined instance of HCM/CS)

In general an outbound message is published from any place within Campus Community where a person or his attributes can be created or updated: everywhere that PERSON_BASIC_SYNC and PERSON_SA data is used, as well as the Affiliations components and wherever the FERPA flag appears.

Supported Interaction Patterns

Request/Response	Service	Operation
Asynchronous Request		SCC_CONSTITUENT_SYNC
Synchronous Request/Response	Not supported	Not supported

Request Message

The request message contains the entire constituent object, including affiliations and the FERPA flag contained in the PERSON_SA record.

Behavior

Whenever constituent information is created or changed an XML message is published.

External Search/Match

The Campus Solutions system uses this operation to search/match (query) against constituents stored within an external system.

Supported Interaction Patterns

Request/Response	Service	Operation
Asynchronous Request	Not supported	Not supported
Synchronous Request/Response	SCC_SM_SERVICE	SCC_SM_SERVICE_SYNC
	SCC_SM_FETCH	SCC_SM_FETCH_SYNC

Request Message

The request message is the external system Search/Match request object. This is a list of fields that may be partially populated to perform a search against the external system for potential constituents that match the criteria.

Behavior

The response includes all constituents matching the criteria according to the configured matching rules. Alternatively, the system returns a constituent fault message that includes detailed error messages and explanations.

External Read ("Get") Constituent

The Campus Solutions system uses this operation to read a constituent record stored within an external source.

Supported Interaction Patterns

Request/Response	Service	Operation
Asynchronous Request	Not supported	Not supported

Request/Response	***Service***	***Operation***
Synchronous Request/Response	SCC_CONSTITUENT	SCC_GET_CONSTITUENT

Request Message

The request message contains the EmplID of the constituent stored in the external system.

Response Message

The response includes all constituent details stored in the external system for the given EmplID. If there is no valid response, the system returns a constituent fault message that includes the detailed error messages and explanations.

Behavior

The external system validates the EmplID transmitted in the request message and if the ID is present, the system looks up the given constituent and returns all attributes for the constituent.

Inbound Services

The PeopleSoft system delivers two inbound service operations to manage changes to constituent data. In order to respond to constituent data updates generated in external systems, the constituent web service must listen to and process the inbound response.

Read ("Get") Constituent

Use this operation to request the details of a single constituent in the Campus Solutions system.

Supported Interaction Patterns

Request/Response	***Service***	***Operation***
Asynchronous Request	N/A	N/A
Synchronous Request/Response	SCC_CONSTITUENT	SCC_GET_CONSTITUENT

Request Message

The request message is the EmplID, the unique identifier for a constituent.

Response Message

If a constituent is found with the supplied EmplID then the service returns the populated constituent object. Otherwise, it returns a null constituent object.

Behavior

The constituent service validates the EmplID, if present, and populates the response message with all details of the constituent accessible to the caller.

Update Constituent

Use this operation to update the information of a single constituent in the Campus Solutions system.

Supported Interaction Patterns

Request/Response	***Service***	***Operation***
Asynchronous Request	SCC_CONSTITUENT_IN_SYNC	SCC_CONSTITUENT_IN_SYNC
Synchronous Request/Response	N/A	N/A

Request Message

The request message contains the EmplID to uniquely identify the constituent to be updated, along with any attributes of the constituent that need to be updated.

Response Message (synchronous only)

The response indicates whether the constituent was updated successfully. If not, the system returns a constituent fault message that includes the detailed error messages and explanations.

Behavior

The constituent service validates the data passed in the request message. If the request is valid and the constituent can be found then the constituent is updated. All CS and HCM validation is performed. If any aspect of the data is invalid then the entire request is rejected. If an attempt is made to update non-updatable constituent attributes then the caller may be warned of this in the response.

Query Constituent

Use this operation to query against the constituents contained within the Campus Solutions system.

Supported Interaction Patterns

Request/Response	***Service***	***Operation***
Asynchronous Request	N/A	N/A
Synchronous Request/Response	SCC_CONSTITUENT	SCC_GET_CONSTITUENT

Request Message

The request message is the Campus Solutions Search/Match request object. This message contains a list of fields that can be partially populated in order to perform a search against the database for potential constituents that match the criteria. The request also includes the Search/Match setup ID.

Response Message

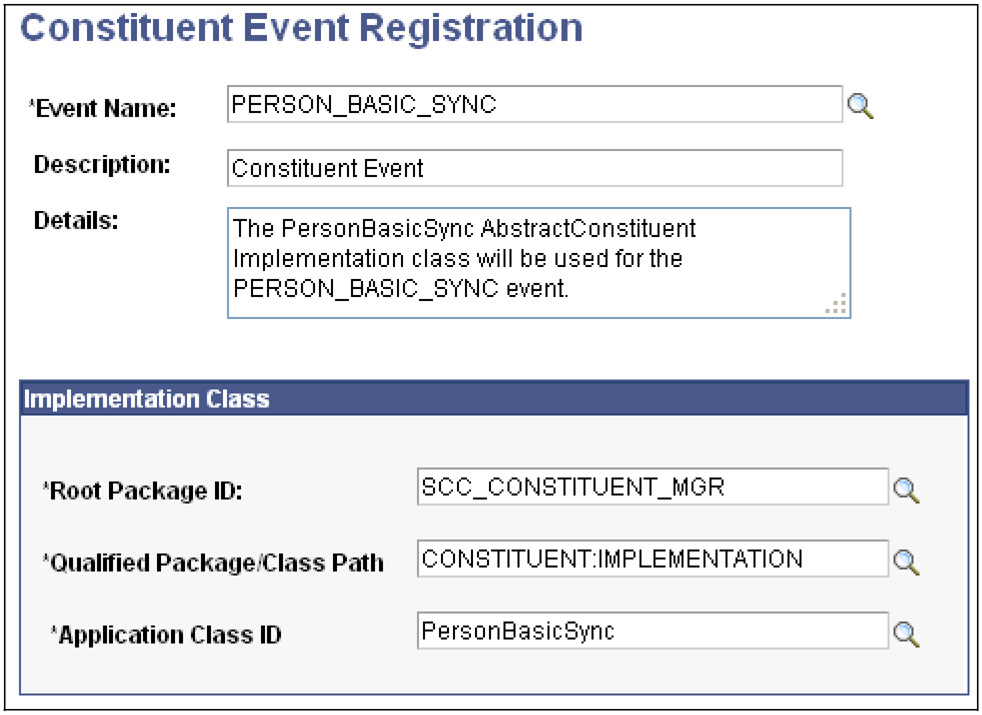
The response includes a collection of zero to many Search/Match results objects. The Search/Match result object contains partial constituent details along with weighting information that can be used to determine which returned constituent best matches the criteria.

Behavior

The operation validates the Search/Match request. If the request is valid, the system performs a Search/Match against the database and returns the results.

Configuring Constituent Event Triggers

To register events, access the Constituent Event Registration page (Set Up SACR, System Administration, Utilities, Constituent Management, Constituent Event Registration).



Constituent Event Registration page

PeopleSoft delivers three events: *SCC_CONSTITUENT_IN_SYNC,PERSON_BASIC_SYNC*, and *SCC_PERSON_SYNC*. Constituent web services utilizes these registered events in their processing.

Warning! Do not modify the delivered events. If your institution creates new events to trigger messaging, you must add the new events here and register them with constituent web services.

Implementation Class

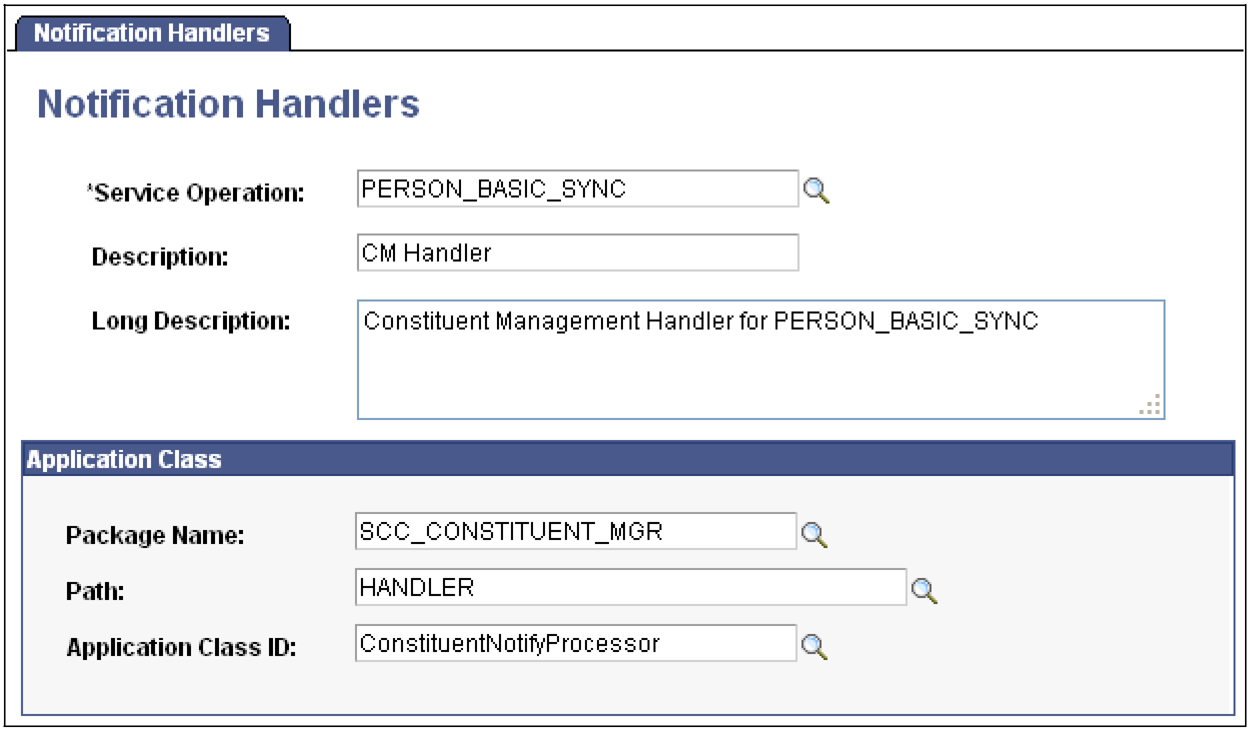
Root Package ID This is the application package name.

Qualified Package/Class Path This is the subpackage name. This field defines the path from application package to application class.

Application Class ID This field lists the application class, which holds the implementation logic.

Configuring Notification Handlers

To register all delivered message handlers, access the Notification Handlers page (Set Up SACR, System Administration, Integrations, Notification Handlers).



Notification Handlers page

PeopleSoft delivers three handlers: *SCC_CONSTITUENT_IN_SYNC,PERSON_BASIC_SYNC*, and *SCC_PERSON_SYNC*. The service-oriented architecture (SOA) framework uses handlers for its messaging.

Warning! Do not modify the delivered message handlers. If your institution creates new events to trigger messaging, you must add the new handlers here and register them with constituent web services.

Application Class

Package Name This is the application package name.

Path This field defines the path from application package to application class.

Application Class ID This field lists the application class, which holds the messaging logic.

Configuring Integration with External Systems

Use the External Core Data Integration page to indicate that the Campus Solutions system is integrated with a constituent data hub or other external system managing person data. This page is also used to enable External Search/Match functionality.

Chapter 21

Setting Up Student Groups

This section provides an overview of student groups and discusses how to:

- Set up a student group.
- Set up student group security.
- View a student group by group.
- Manually assign a student to student groups.
- Assign a group of students to a student group.
- View student groups by student.

Understanding Student Groups

Student groups enable you to define groups of similar students at a high level, such as athletes, student body officers, or honor students. Creating groups of students enables you to track and use the students within a group for campus-wide processing, such as billing, academic advising, or financial aid awarding.

Note. You can assign only students from the same institution to a student group.

Student group security enables you to assign student groups to a user ID. At least one user ID should have update access to a student group for assignment and processing purposes.

Mass assignment allows a user to create, or update multiple students using a single run control process. Mass assignment is now available for student groups. The process incorporates population selection along with the ability to assign individual ID's for student group assignment.

Users can also view the student groups to which they have access, either by student or by group.

Setting Up a Student Group

To set up a student group, use the Student Group Table component (STDNT_GROUP_TBL).

The system does not deliver any predefined student groups, so you need to define your own to meet your institution's needs. You can add one or multiple groups. Each group will need a enter a unique four-character letter identifier such as ATHL for Athletics, EXTL for external student, or ACDX for Academic Excellence.

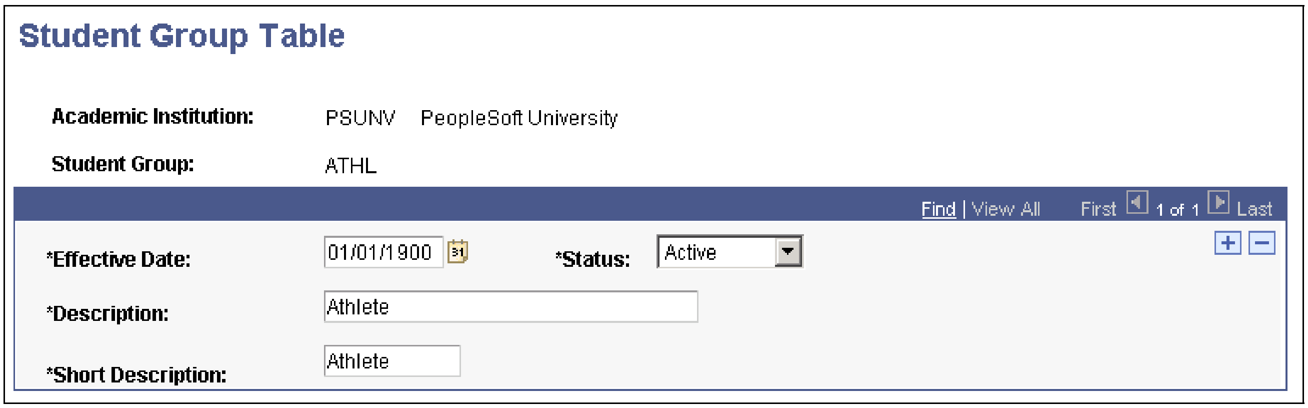
This section discusses how to set up a student group.

Page Used to Set Up a Student Group

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Group Table	STDNT_GROUP_TABLE	Set Up SACR, Common Definitions, Student Group Table	Set up a new student group or view an existing student group definition.

Setting Up a Student Group

Access the Student Group Table page (Set Up SACR, Common Definitions, Student Group Table).



Student Group Table page

Effective Date Enter the date the student group is created.

Setting Up Student Group Security

To set up security for a student group user ID, use the Student Group Security component (SCRTY_TBL_STGP).

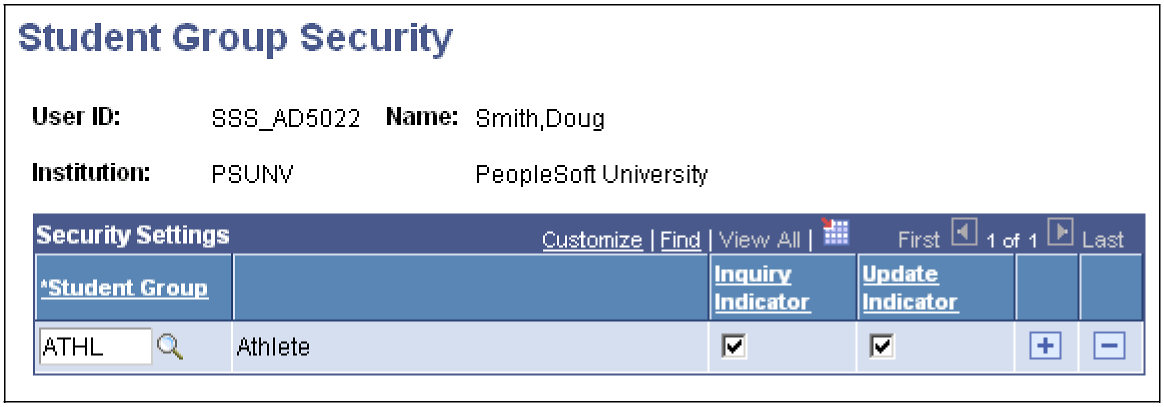
This section discusses how to set up user ID security access for student groups.

Page Used to Set Up Student Group Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Group Security	SCRTY_TBL_STGP	Set Up SACR, Security, Secure, Student Administration, User ID, Student Group Security	Set up the user ID security access for student groups. Modify a user ID's student group security access.

Setting Up a User ID's Student Group Security

Access the Student Group Security page (Set Up SACR, Security, Secure, Student Administration, User ID, Student Group Security).



Student Group Security page

Security Settings

Student Group Enter the student group to which the ID should have access.

Inquiry Indicator Select to allow the user to view this student group.

Update Indicator Select to allow the user to view and modify this student group.

The system automatically selects the Inquiry Indicator when you select the Update Indicator check box.

You can add an additional five user ID security access for student groups.

Viewing a Student Group by Group

To view a student group by group, use the View Student Groups by Group component (STDNT_GROUPS_INQG).

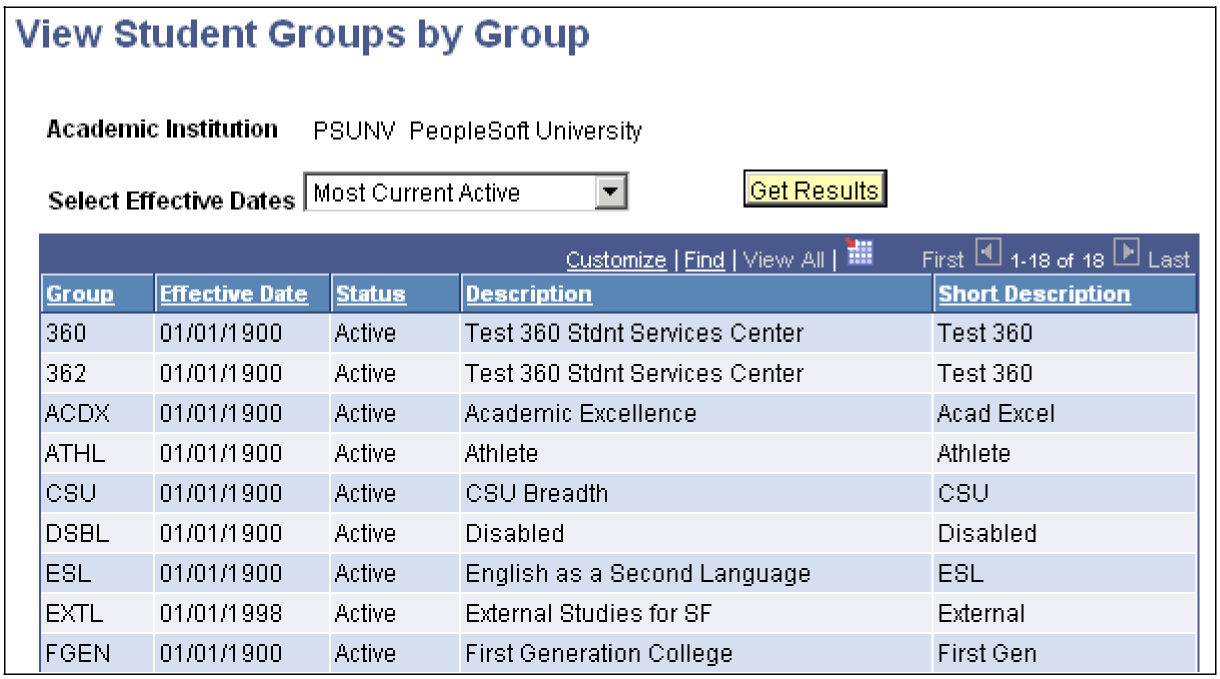
This section discusses how to view a student group by group.

Page Used to View a Student Group by Group

Page Name	Definition Name	Navigation	Usage
View Student Groups by Group	STDNT_GROUPS_INQG	Set Up SACR, Common Definitions, View Student Groups by Group	Display student groups to which you have access, by group.

Viewing Student Groups by Group

Access the View Student Groups by Group page (Set Up SACR, Common Definition, View Student Groups by Group).


View Student Groups by Group

Academic Institution PSUNV PeopleSoft University

Select Effective Dates Most Current Active

Get Results

Customize | Find | View All | First 1-18 of 18 Last

Group	Effective Date	Status	Description	Short Description
360	01/01/1900	Active	Test 360 Stdnt Services Center	Test 360
362	01/01/1900	Active	Test 360 Stdnt Services Center	Test 360
ACDX	01/01/1900	Active	Academic Excellence	Acad Excel
ATHL	01/01/1900	Active	Athlete	Athlete
CSU	01/01/1900	Active	CSU Breadth	CSU
DSBL	01/01/1900	Active	Disabled	Disabled
ESL	01/01/1900	Active	English as a Second Language	ESL
EXTL	01/01/1998	Active	External Studies for SF	External
FGEN	01/01/1900	Active	First Generation College	First Gen

View Student Groups by Group page

Select Effective Dates

Enter the type of effective dates to view. Values are:

All: Returns all student groups and displays all effective-dated rows for each group.

Most Current (Any Status): Returns all student groups and displays only the most current effective-dated row, regardless of status.

Most Current Active: Displays the most current active student group row.

Most Current Inactive: Displays the most current inactive status student group row.

Get Results

Click to view the list of student groups that match the selected effective date search criteria.

Manually Assigning a Student to Student Groups

To manually assign a student to a student group, use the Student Groups component (STDNT_GROUPS_PERS).

This section discusses how to manually assign a student to student groups.

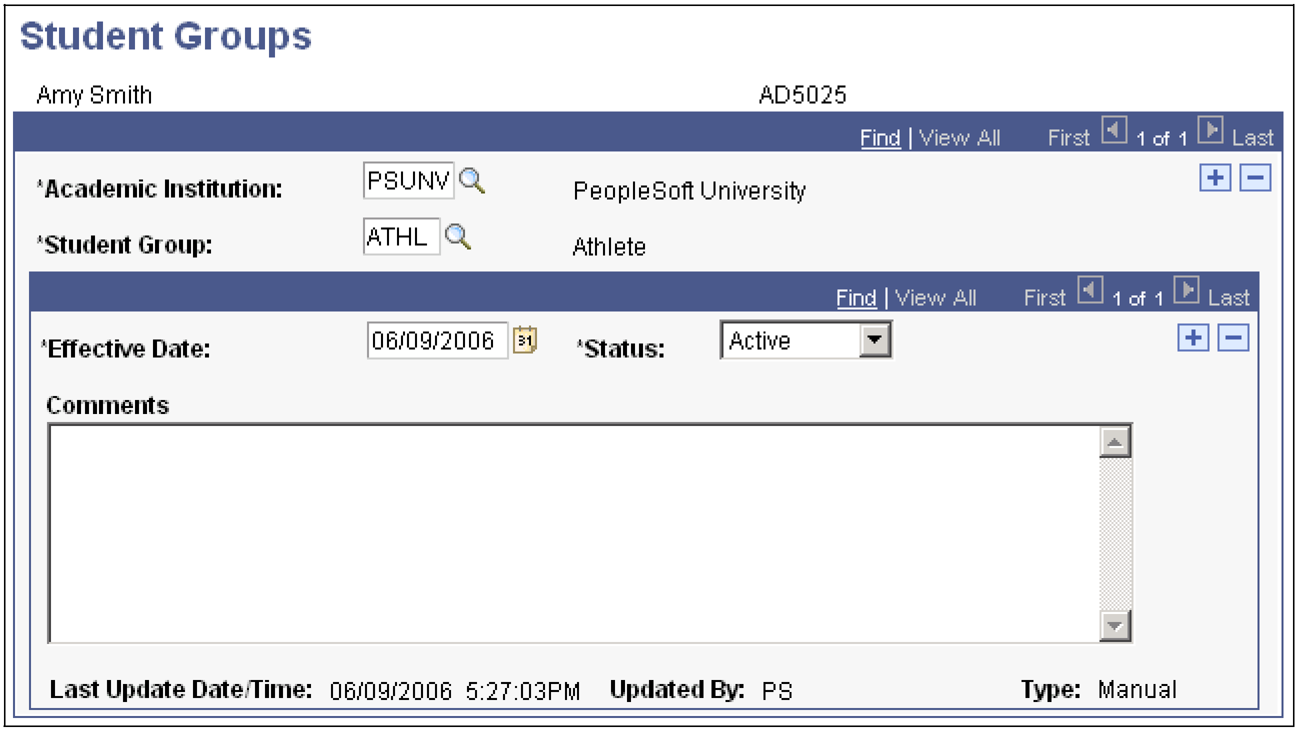
You can access the Student Groups page through multiple navigation paths. The primary path appears first.

Page Used to Manually Assign a Student to Student Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Groups	STDNT_GROUPS_PERS	• Records and Enrollment, Career and Program Information, Student Groups • Student Recruiting, Maintain Prospects, Academic Information, Student Groups • Student Admission, Application Entry, Academic Information, Student Groups	Activate, inactivate, or delete a student from a student group.

Assigning a Student to a Student Group

Access the Student Groups page (Records and Enrollment, Career and Program Information, Student Groups).



Student Groups page

Student Group	Enter the student group to which you want to assign the student.
Effective Date	Enter the date the assignment to the group takes effect.
Status	Enter *Active* or *Inactive.*
Comments	Enter comments for your reference about the student group.
Last Update Date/Time	Displays the date and time the record was updated.
Updated By	Displays the user ID responsible for updating the student group.
Type	Indicates whether the record was processed manually or by mass update. When updated through the mass process, the program name appears.

Assigning a Group of Students to a Student Group

To run the process to assign a group of students to a student group, use the Process Student Group component (RUNCTL_STD_GRPS).

The process for assigning a group of students to a student group can be run with or without Population Selection selected. If you use the Population Selection PS Query option, you must include the STDNT_GRP_BIND record in the query to place it in the list of eligible queries on the Process Student Group page.

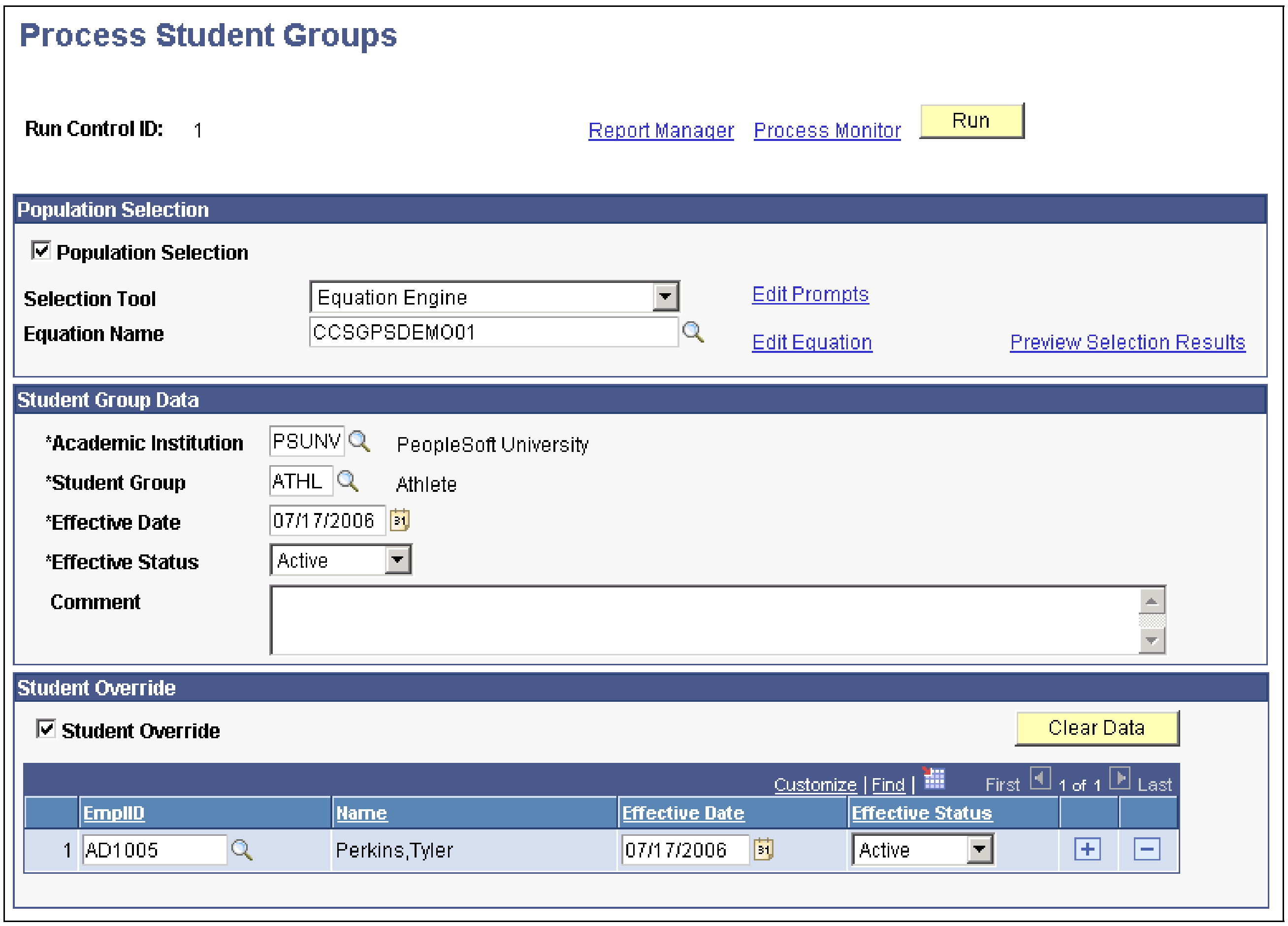
This section discusses how to run the student group process.

Page Used to Assign a Group of Students to a Student Group

Page Name	*Definition Name*	*Navigation*	*Usage*
Process Student Groups	RUNCTL_STD_GRPS	Records and Enrollment, Career and Program Information, Process Student Groups	Run the Student Group process to assign a group of students to a student group.

Running the Student Group Process

Access the Process Student Groups page (Records and Enrollment, Career and Program Information, Process Student Groups).



Process Student Groups page

Population Selection

This group box appears when the *Population Selection* process is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tool that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a student group transactions, you must use it.

Student Group Data

Academic Institution Displays the user's default institution. You can change this value. The process selects IDs only from the institution specified in the Academic Institution field.

Student Group Enter the student group for mass ID assignment.

Effective Date Enter an effective date to use for all of the IDs assigned to the student group during this run of the process.

The default value is the current system date.

Effective Status Select *Active* or *Inactive.*

Comment Enter a comment that you want to assign to each student for the process.

Student Override

You can use the student override function to enter student IDs individually for assignment to a student group. You can use this function in conjunction with the Population Selection option. If you use both features, the student override function processes first. If duplicate IDs exist in the student override function and the population selection function and the effective dates are the same, only one row will be inserted using the student override status, regardless of status. If the effective dates differ, then a row will be inserted for each process instance.

Student Override Select to enable overrides and to display fields where you can specify the IDs to override.

Empl ID Enter the student's ID.

Effective Date Enter an effective date for each ID for the process instance. The effective dates can be different for each ID.

The default value is the effective date that appears in the Student Group Data group box. If you enter a new date in this field, then this date will be provided by default to each record entered.

Effective Status Enter the status for each ID for the process instance. The status can be different for each ID.

Viewing Student Groups by Student

To view a student group by student, use the View Student Groups by Student component (STDNT_GROUPS_INQS).

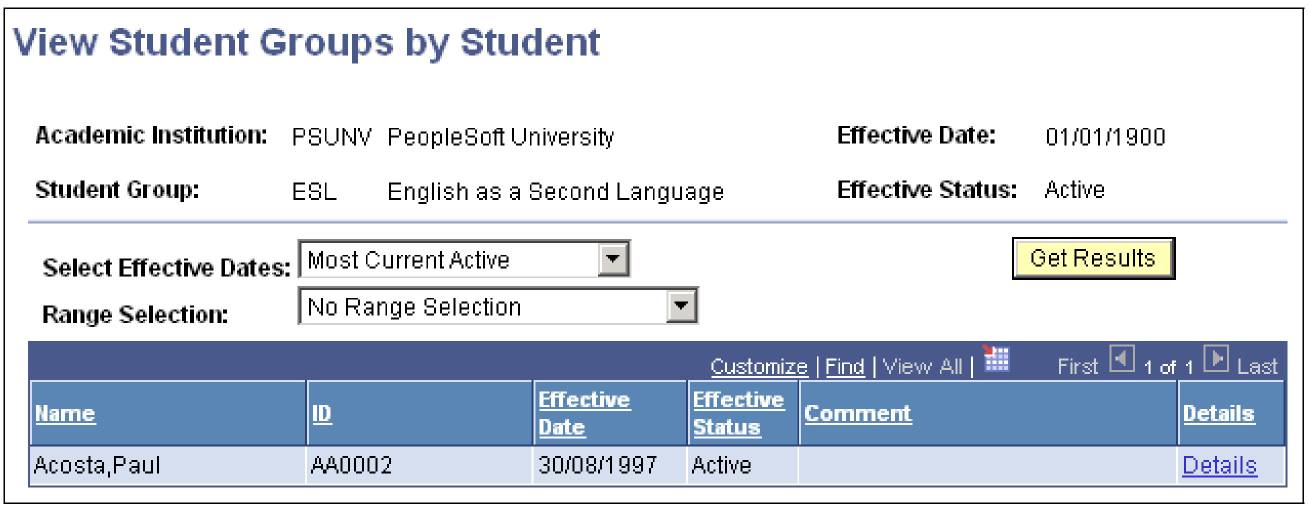
This section discusses how to view a student group by student.

Page Used to View a Student Group by Student

Page Name	*Definition Name*	*Navigation*	*Usage*
View Student Groups by Student	STDNT_GROUPS_INQS	Records and Enrollment, Career and Program Information, View Student Groups by Student	Display student groups to which you have access, by student.

Viewing a Student Group by Student

Access the View Student Groups by Student page (Records and Enrollment, Career and Program Information, View Student Groups by Student).



View Student Groups by Student page

Select Effective Dates	Enter the type of effective dates to view. Values are: *All:* Returns all student groups and displays all effective-dated rows for each group. *Most Current (Any Status):* Returns all student groups and displays only the most current effective-dated row, regardless of status. *Most Current Active:* Displays the most current active student group row. *Most Current Inactive:* Displays the most current inactive status student group row.
Range Selection	Enter a range of student groups to view. Values are: *No Range Selection:* Displays the ID From and ID To fields. Unhide the Last Name From and Last Name To fields. Entering a Last Name From 'A' and Last Name To 'D' will return records with last names beginning with A to C and exclude D. *Select Emplid Range:* Displays the ID From and ID To fields. Enter *0001* in the ID From field and *0010* in the ID To field to view records with IDs from 0001 through 0010. *Select Last Name Range:* Displays the Last Name From and Last Name To fields. If you enter *A* in the Last Name From field and *D* in the Last Name To field, the system will return records with last names beginning with A through C but excluding D.
Get Results	Click to display the list of students in the specified student group that matches the search criteria you entered.
Details	Click to view additional details about the ID. You will be transferred to a student group page view in correction mode. You can make changes in this view. If you make changes and click the Apply button so the View Student Groups by Student page appears. You must refresh the View Student Groups by Student page to view your changes. You can also click the OK or Cancel button to display the View Student Groups by Student page.

Chapter 22

Setting Up Communications

To set up communications, use the following components: Standard Letter Table (SA_STNDR_LTR_TABLE), Communication Context Table (COMM_CTXT_TBL), Communication Category Table (COMM_CATG_TBL), Communication 3C Groups (COMM_GRP_3C_TBL), and Communication Speed Key Table (COMM_SPEED_KY_INST).

Use the Communication Contexts (SCC_COMM_CTXT_TBL) and Communication Categories (SCC_COMM_CATG_TBL) component interfaces to load the data into the tables for these components.

Use the Communication Data Source (SCC_CG_DTASRC) and Report Definition (PSXPRPTDEFN) components to set up the Communication Generation process.

This chapter lists prerequisites, provides an overview of setting up communications, and discusses how to:

- Define letter codes.
- Define contexts and categories.
- Define 3C groups.
- Define communication speed keys.
- Set up the Communication Generation process.

Understanding Communications Setup

Before you can assign communications to individuals, organizations, or groups of individuals, you must identify the letter codes and methods to use and set up the contexts and categories. You will also want to create 3C groups to control security access to communications, and define Communication Keys (Comm Keys) to streamline communication data entry.

A letter code must exist for each template that you plan to use. A letter code links extracted data to a template created to be used with the Letter Generation (Letter Gen) process or with the Communication Generation (Comm Gen) process. You can also use letter codes to group letters to send as enclosures. The PeopleSoft system delivers sample letter templates in Microsoft Word. You can use the sample templates as they are, modify them, or create your own.

Warning! Some processes are dependent on the predefined letter codes and their templates. Read the documentation carefully and check with your administrator before modifying a predefined letter code or template.

You must create communication contexts and group them into communication categories to set up communication management. Communication contexts are broad groupings that indicate the type of communication and how it was sent or received. Methods include letter, phone call, fax, email, and in person. You can specify more than one method of communication for each context. For example, if students can contact your institution by letter, email, or phone to confirm admission acceptance, you might create an Admissions Acceptance communication context that includes all three methods.

A communication category is a broad grouping of communication contexts that generally indicates why a communication was sent or received. For example, you might create an Admissions communication category that includes the following communication contexts: application received, admission acceptance, admission decline, admission deferral, frosh admit, frosh deny, and so on, or you might decide to create more detailed communication categories such as Frosh Recruit, Frosh Admission, Graduate Recruit, and Graduate Admission.

Use communications 3C groups to grant groups of users inquiry or update security access to the categories of communications in your database.

Use Comm Keys (communication speed keys) to create a shorthand method of specifying common communication data. With the controls in place—standard letter codes, communication methods, communication directions, communication contexts, and communication categories—you can set up Comm Keys to combine these controls with a number of defaults into one shortcut page control.

Note. Comm Keys are required if you plan to use the 3C engine process to assign communications to individuals or organizations.

To help decide which process is better for your institution, the following table lists the features of both the Letter Generation and the Communication Generation processes.

Feature Type	***Feature***	***Letter Generation***	***Communication Generation***
System	Process Type	SQR	Application Engine
	Person ID, Org ID, Both	X	X
Communications	Communication Recipients	X	X
	Joint Communications	X	X
	Enclosures	X	X
	Include Checklist Items	X	X
	Update Checklist	X	X
	Print Comment	X	X
Communication Methods	Letter Method	X	X
	Email Method		X
	Preferred Communication Method		X

Feature Type	***Feature***	***Letter Generation***	***Communication Generation***
Communication Language	Base Language	X	X
	Specified Language		X
	Preferred Communication Language		X
Extract Data	Generic list (delivered)	Extensive	Limited
	Custom List	SQC file	PS Query App Class
	Missing Critical Data	Predefined	Configurable
Extracted Data Storage	Communication Letter Data component	X	
	Communication Management Components (generated output)		X
Supported Output Formats	TXT	X	
	RTF		X
	PDF (required if send to printer)		X
	HTML (email format)		X
	XLS		X
Template Creation	MS Word	X	X
	Template Builder (delivered)		X
	Adobe Acrobat		X
Organization Communications	Org Recipients (contact, department, location)	One	Multiple and Mixed
	Org Recipient Usage Table		X
Include Checklists	Administrative Function	One	Multiple
	Checklist Code	One	Multiple
	Checklist Type	One	Multiple
	Tracking Group	One	Multiple
	Item Status	Hard Coded	Selectable

Feature Type	*Feature*	*Letter Generation*	*Communication Generation*
Other	Preview Option (Report Manager)		X
	Send to Printer	X	X
	Sort Outputs	X	X
	Generate Labels	X	TBD
	Oracle BI Publisher		X

Prerequisites

Before designing your communication structure, do the following to analyze your functional areas and institutional needs for tracking and scheduling communications for individuals and for external organizations:

- Understand the use of administrative functions and 3C groups and make sure they are set up properly.
- Identify all incoming, outgoing, and in-person contacts to track.
- Identify the various types of contact (for example, phone, letter, email, and fax) that your institution wants to track.
- Set up usages for names, addresses, and salutations.

Defining Letter Codes

To define letter codes, use the Standard Letter Table CS (SA_STNDR_LTR_TABLE) component.

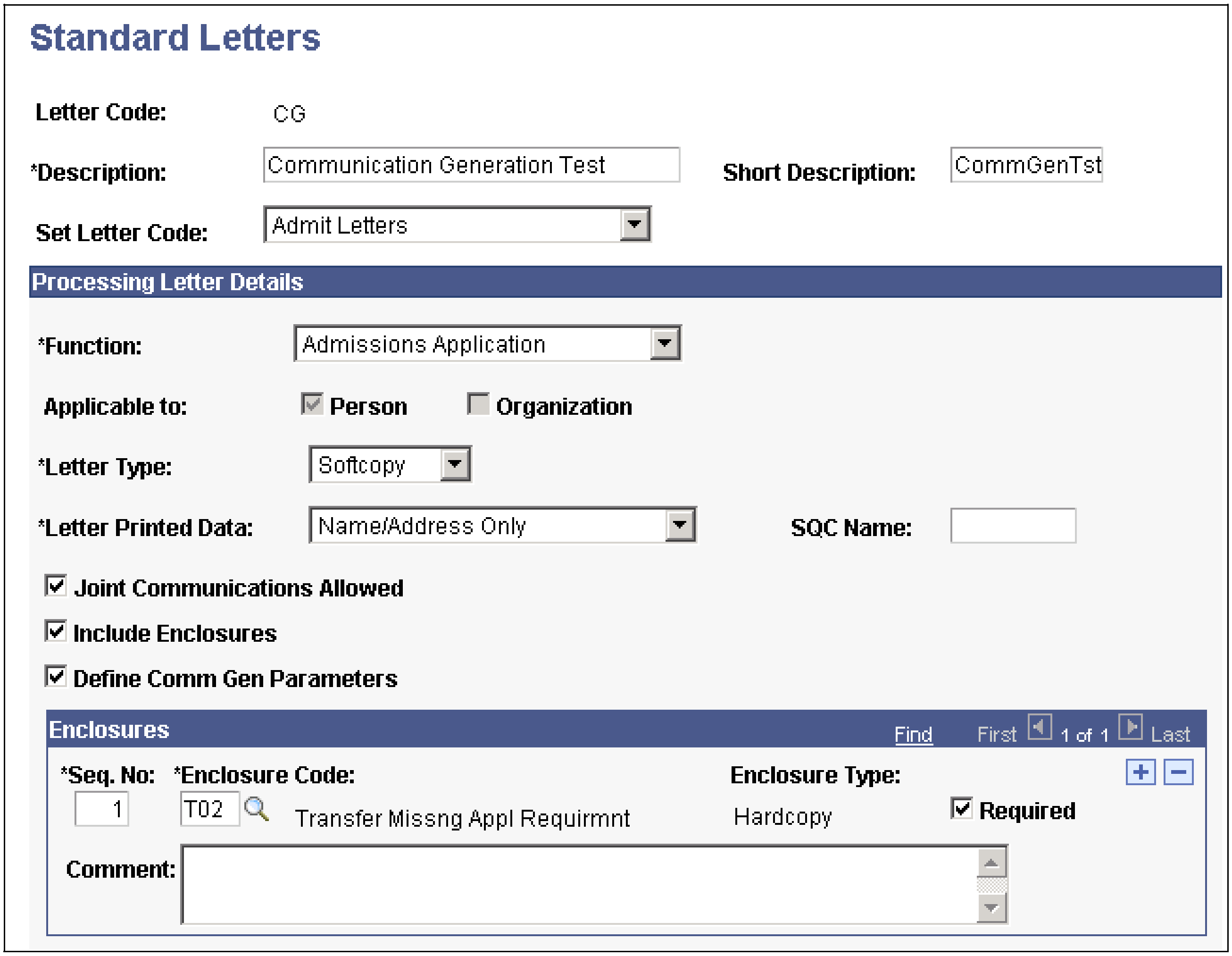
This section discusses how to define letter codes.

Page Used to Define Letter Codes

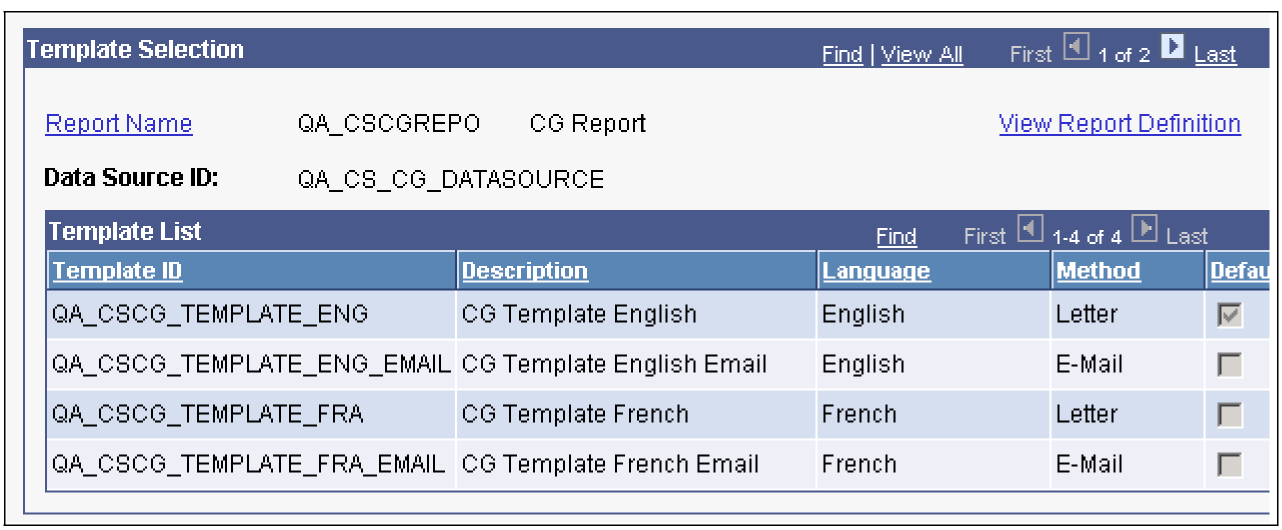
Page Name	*Definition Name*	*Navigation*	*Usage*
Standard Letters	SCC_STN_LTR_TBL	• Set Up SACR, Common Definitions, Communications, Standard Letter Table CS • Campus Community, Communications, Set up Communications, Standard Letter Table CS • Contributor Relations, Communications, Set Up Communications, Standard Letter Table	Review or define the types of letters that your institution wants to generate by assigning a letter code and administrative function to each. You can also group letters to create enclosures.

Setting Up a Letter Code

Access the Standard Letters page (Set Up SACR, Common Definitions, Communications, Standard Letter Table CS).



Standard Letters page (1 of 2)



Standard Letters page (2 of 2)

Warning! Standard letter codes are not shared between PeopleSoft Campus Solutions and PeopleSoft HRMS. Standard letter codes for Campus Solutions are stored on the Standard Letters page (SCC_STN_LTR_TBL) in the Standard Letter Table CS component (SA_STNDR_LTR_TABLE). Standard letter codes for HRMS are stored on the Standard Letter Table page (STANDARD_LTR_TBL) in HRMS. Be sure to use the Campus Solutions Standard Letters table and to read the specific product documentation before modifying any letter code delivered within that product.

Within Campus Solutions, you must be familiar with the scope of the PeopleSoft Financial Aid *FAN* code or template before modifying it.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Generating Form Letters"

Set Letter Code

Select the category (such as Admit Letters, Inquiry Response Letters, Recruitment Letters, and so on) that best describes the group of letters that includes this letter code. This field is optional and for information only.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Processing Letter Details

Function

Select the function, from the Administrative Function Table page, that identifies the variable data to extract for communications associated with this letter code.

For example, if you are sending a letter to a freshman applicant under the function of *Student Term,* the variable data of Academic Career and Term are extracted for the communication. The variable data are set up in the Administrative Function table and cannot be modified.

Applicable To

When you select the function, the system indicates the types of IDs that can receive communications associated with that function by selecting the Person check box, the Organization check box, or both check boxes.

If the function permits communications with both persons and organizations, both check boxes are available for editing. You can select or clear the check boxes to limit the communications to either persons only or organizations only.

Letter Type

Select the check box for the desired output form for this letter. Values are:

Hardcopy: Does not allow the system to extract data or merge into a softcopy template. Indicates preprinted items, such as brochures or pamphlets.

Softcopy: Allows the system to extract data and merge into a softcopy template, which you can then print.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Letter Printed Data

Enter the type of extracted data for the process to save for historical purposes.

The Letter Generation process saves the data that you specify and displays it on the Communication Letter Data page. You can select *All* to save all of the communication headers and their data, *Name/Address Data* to save only the name and address headers and their data, or *None* to save no data.

Warning! The Letter Generation process extracts a huge amount of data. Saving all of the communication headers and their data can cause the table to be huge and the Communication Letter Data page to take significant time to load.

The Communication Generation process either saves the generated output with all data or does not save the generated output. Select either *All* or *Name/Address Data* to store the sample output and make it available from the View Generated Communication link on the Person Communication Management or the Organization Communication Management components. Select *None* not to store a sample output or any data, in which case, the View Generated Communication link does not appear.

The values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

SQC Name

Enter the name of the unique SQC, if any, required to generate additional variable data for communications associated with this letter code.

The Letter Generation process uses the unique SQC to extract data into a letter template. You must modify the letter generation SQR (CCLTRGEN.sqr) to look for any SQCs that you specify here.

Warning! Do *not* modify the CCLTRWOL.SQC. The User Profiles Management process requires this SQC. Any modifications to this could require substantial programming effort. For information about the SQCs that are delivered with your system, see My Oracle Support.

The Communication Generation process does not use SQCs. It uses Application Classes or PS Query to extract specific fields.

Joint Communications Allowed

Select to permit this letter to be addressed jointly to two people at the same address, provided that they have a relationship defined in your database that permits joint communications.

The sample Microsoft Word template CCLTRJNT.doc is provided for use with joint communications generated by the Letter Generation process. For the Communication Generation process, examples are provided in the QA_CS_CC_LETTERCD_<letter code><language><method>.rtf template definitions.

Include Enclosures

Select to indicate that other letters must be grouped and sent with this letter. When selected, the Enclosures group box appears.

Define Comm Gen Parameters (define communication generation parameters)

Select to allow the Communication Generation process to generate communications with this letter code.

Enable the Communication Generation process for letter codes that might be used as enclosures, too. If you do not enable the process for a letter code that is an enclosure, the process cannot produce it and will return an error.

When selected, the Template Selection group box appears.

Enclosures

This group box is available only when the Include Enclosures check box is selected. You can group a maximum of 10 letter codes as enclosures here. Letter codes from which to select must already exist on the Standard Letters page.

Seq Number (sequence number)

Displays the number of this enclosure in the list of enclosures for this letter. The system automatically enters the next sequential number for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures.

When you run the Letter Generation data extract process or the Communication Generation process, the process lists, in the order identified here, up to 10 enclosures on the main letter in the order identified here.

Enclosure Code

Enter the code for the letter to include as an enclosure.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code prompt list displays the letter codes that exist and that are associated with the function ADMA on the Standard Letters page.

Enclosure Type

The system displays the type of output associated with the selected enclosure letter code, either *Softcopy* or *Hardcopy*.

Both the Letter Generation and Communication Generation processes will extract data for an enclosure set to *Softcopy*. Both processes will extract the enclosure code descriptions whether they are set to *Hardcopy* or *Softcopy* and you can list them all as attachments in the main letter template. A hardcopy enclosure is a printed brochure or other item produced outside of your PeopleSoft system that you must insert to include as an enclosure.

Required

Select this check box to indicate that the specific enclosure must accompany the main letter at all times. Administrative users can remove optional enclosures when they assign the communication to an individual on the Communication Management page or to an organization on the Org Communication Management page.

Comment

Enter comments to further identify or describe this enclosure. Enclosure comments are for information purposes only. They will not be printed in the communication.

Template Selection

This group box is available only when the Define Comm Gen Parameters check box is selected. The fields are related to the Communication Generation process only.

Report Name

The system displays the name of the report definition associated with the specified letter code and administrative function. To replace a report, click the Report Name link next to it and select the desired report on the Look Up Report Name page. To add a report, add a new row and click Report Name, and select the desired report.

The report names listed on the Standard Letters page when you save it are the report definitions that will be available on the Communication Generation process run control page for this letter code. Of those reports, only the reports to which the user has security access will be available to that user.

Making multiple reports available can be useful if multiple users send different templates or personalized templates for the letter code. For example, for a letter code dedicated to sending admissions letters, Mary can use her own templates, which might be set in a Report Definition named *MaryAD,*and John can use personalized templates that might be set in a Report Definition named *John_Personal.* Based on the security in the Report Definitions, only John has access to the templates under *John_Personal,* and only Mary has access to templates under *MaryAD.* When generating the communication, John will be able to use only the Report Definitions to which he has access, and Mary will be able to use only the Report Definitions to which she has access.

Data Source ID and **Template List**

Displays the data source ID that is associated with the report name that you enter and lists the Template IDs available for merging with that data source.

Description, Language, Method, and **Default**

The system displays information about the templates available for this communication.

Note. The system will not allow you to save the Standard Letters page if a selected report name includes more than one template with the same language and method combination. The Communication Generation process evaluates the language and method combination to determine which template to use when multiple templates exist in a report definition

---

View Report Definition

Click to open a new browser window displaying the Report Definition search page. In the new browser window, enter the report name or other information about the definition that you want to view and click Search to access the Report Definition component for the report. View the definition to confirm that it is the definition that you want to make available and to preview the templates.

You can make changes to the report definition.

Defining Communication Contexts and Categories

This section discusses how to:

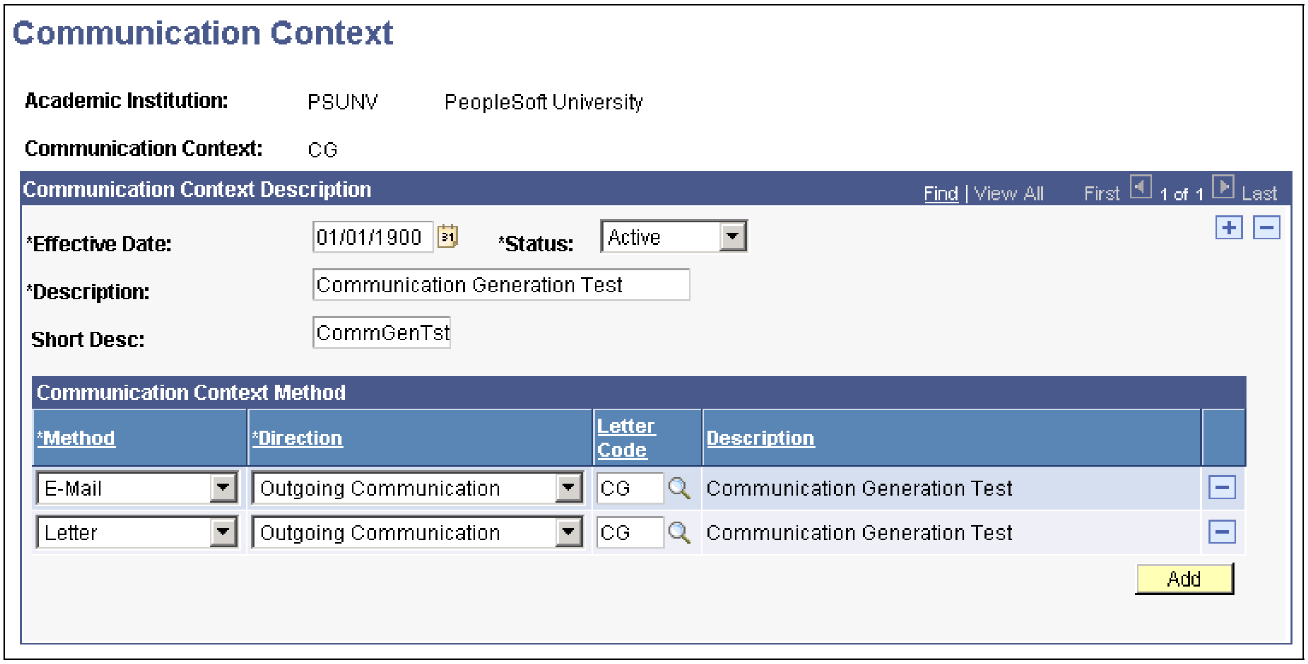
- Define a communication context.
- Define a communication category.

Pages Used to Define Communication Contexts and Categories

Page Name	***Definition Name***	***Navigation***	***Usage***
Communication Context	COMM_CTXT_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Context Table • Contributor Relations, Communications, Set Up Communications, Communication Context Table • Campus Community, Communications, Set Up Communications, Communication Context Table	Create and define communication contexts.
Communication Categories	COMM_CATG_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Category Table • Contributor Relations, Communications, Set Up Communications, Communication Category Table • Campus Community, Communications, Set Up Communications, Communication Category Table	Define categories of communication contexts to indicate why a communication was sent or received.

Defining a Communication Context

Access the Communication Context page (Set Up SACR, Common Definitions, Communications, Communication Category Table).



Communication Context page

Communication Context Method

Method

Select the form of this communication (for example, letter, email, or phone call).

A communication context can have multiple methods. For example, for the context of Award, you might send a letter and also make a phone call.

Values for this field are delivered with your system as translate values. The *Letter* value is required for generating letters with the Letter Generation process; do not modify it. You can, however, modify any of the other method translate values.

Direction

Specify the direction of this communication, such as in person, incoming communication, or outgoing communication.

Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication*, you can modify these translate values.

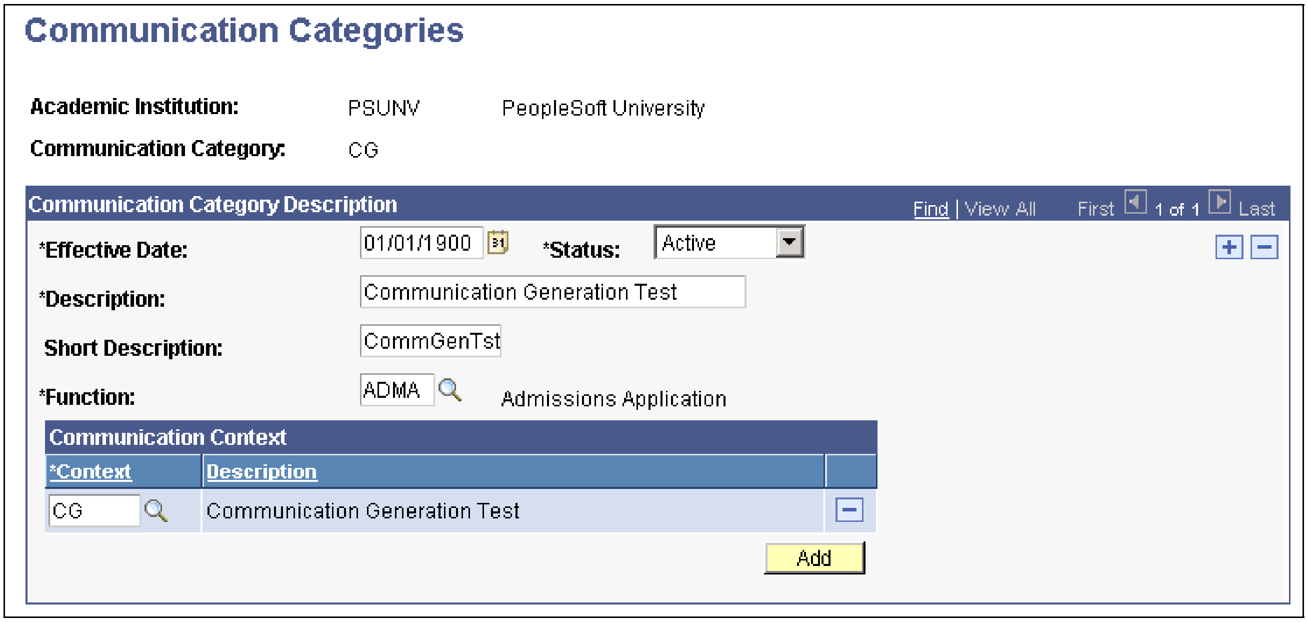
Letter Code

Enter the code for this communication. The code specifies the variable data associated with this communication. The Letter Code field is available only when you specify *Outgoing Communication* in the Direction field.

Available letter codes are from the Standard Letters page.

Defining a Communication Category

Access the Communication Categories page (Set Up SACR, Common Definitions, Communications, Communication Category Table).



Communication Categories page

Note. Communication categories are assigned to communication 3C groups on the Communications 3C Groups page for the purpose of limiting access to the communications associated with those categories. Therefore, make your communication categories specific so that you have more flexibility to determine which users have access to which communications.

Communication Category Description

Function

Enter the functional area to include in this category. The function determines the variable data that will be associated with communications in this category.

Available function codes are from the Administrative Functions page.

Communication Context

Context

Enter each context to include in this category.

Available context codes are from the Communication Contexts page.

Description

The system displays the long description of the context that you select. This value is from the Communication Contexts page.

Warning! All contexts from the Communication Context page are available, regardless of whether they include a letter code associated with the same function as the communication category. For example, if you select a context that has a letter code associated with the ADMA function and a category associated with the PROP function, the letter code will not be available as a valid choice when you assign the communication on the Communication Management page.

Defining 3C Groups

This section discusses how to:

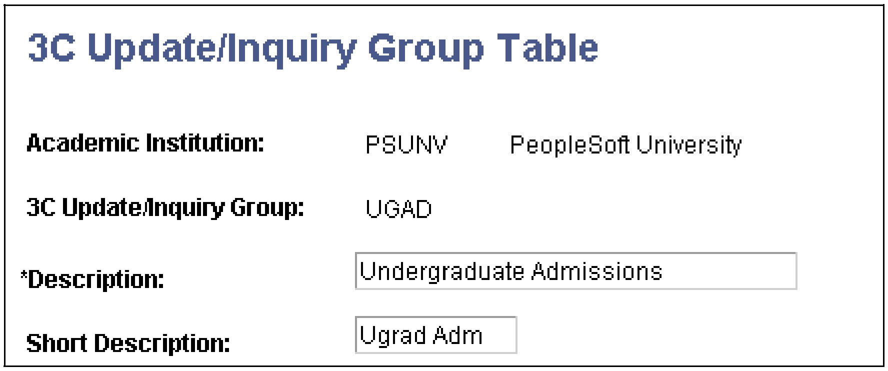
- Define a 3C update/inquiry group.
- Define a communication 3C group.

Pages Used to Define 3C Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Update/Inquiry Group Table	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of users who have similar needs and interests.
Communication 3C Groups	COMM_GRP_3C_TABLE	• Set Up SACR, Common Definitions, Communications, Communication 3C Groups • Contributor Relations, Communications, Set Up Communications, Communication 3C Groups • Campus Community, Communications, Set Up Communications, Communication 3C Groups	Associate one or more 3C update/inquiry groups with a communication category.

Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Group Table page (Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table).



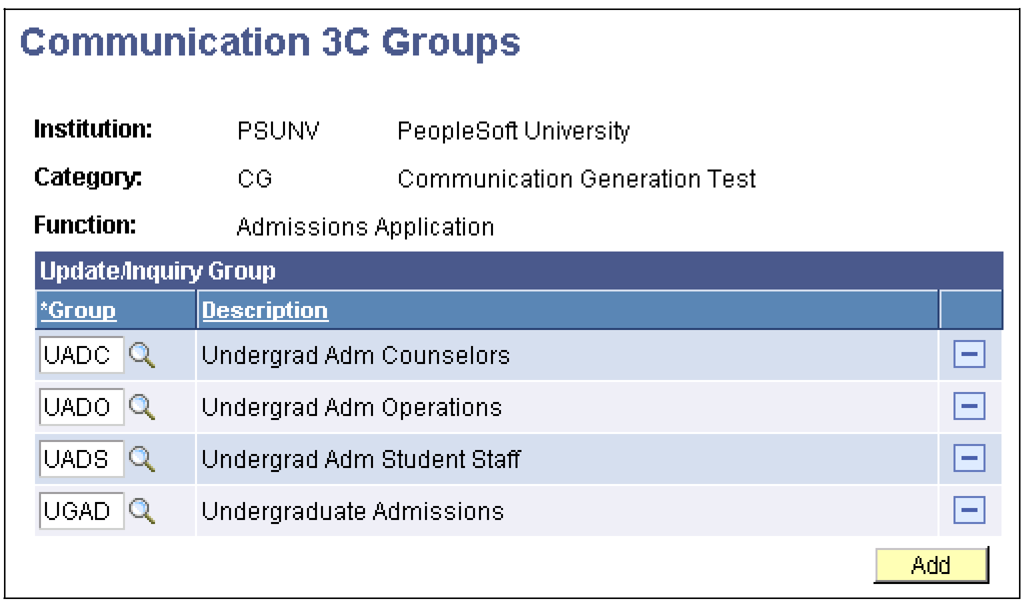
3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a communication category to create a Communication 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

Defining a Communication 3C Group

Access the Communication 3C Groups page (Set Up SACR, Common Definitions, Communications, Communication 3C Groups).



Communication 3C Groups page

Update/Inquiry Group

Group Enter each group that should have access to this communication category.

Available group codes are from the 3C Groups page.

Description	The system displays the long description, from the 3C Groups page, of the group that you select.

Defining Communication Speed Keys

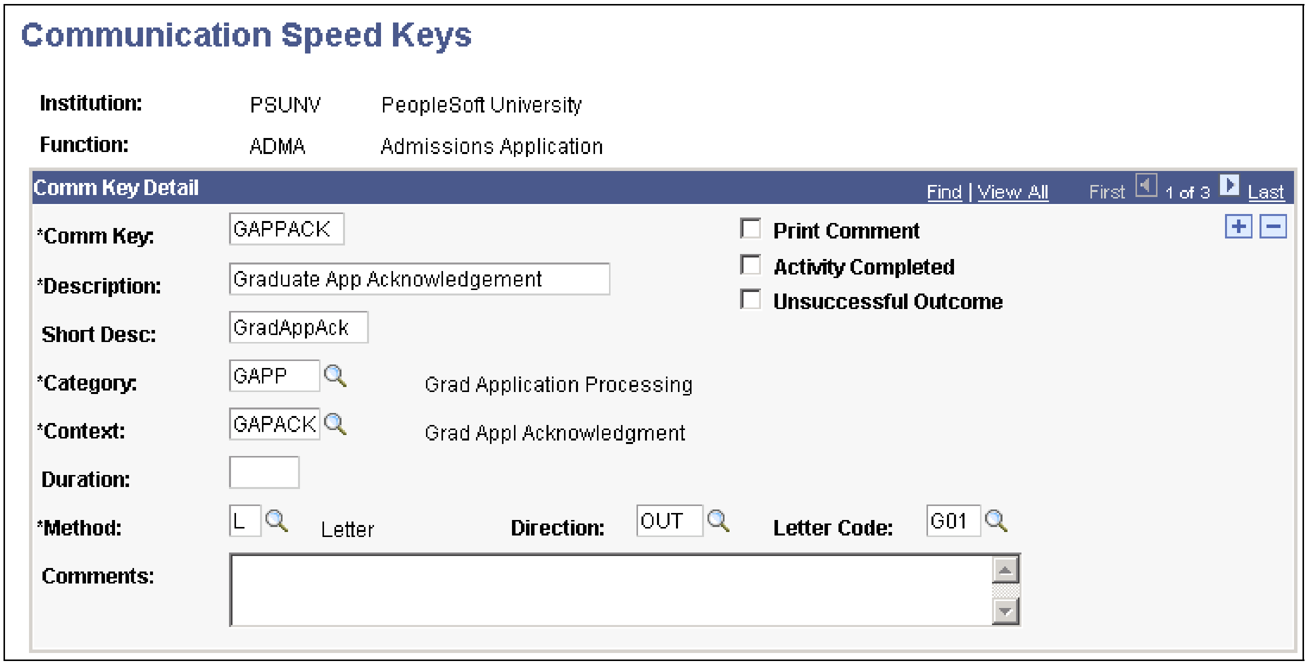
This section discusses how to define communication speed keys as shortcuts for defining communications.

Page Used to Define Communication Speed Keys

Page Name	***Definition Name***	***Navigation***	***Usage***
Communication Speed Keys	COMM_SPDKEY_TABLE	• Set Up SACR, Common Definitions, Communications, Communication Speed Key Table • Contributor Relations, Communications, Set Up Communications, Communication Comm Key Table • Campus Community, Communications, Set Up Communications, Communication Speed Key Table	Create Comm Keys for specifying common communication data.

Defining a Communication Speed Key

Access the Communication Speed Keys page (Set Up SACR, Common Definitions, Communications, Communication Speed Key Table).



Communication Speed Keys page

Comm Key (communication key)
: Enter the name of the communication speed key to represent this set of communication elements.

Category
: Enter the communication category to associate with this communication speed key.

Context
: Enter the communication context to associate with this communication speed key.

Duration
: Enter the average duration, expressed in minutes, for the type of communication that you are associating with this communication speed key. (Optional)

Duration is usually used to specify the length of time for in-person communications (for example, the duration of a phone call).

Method
: Specify the typical method of the communication that you are associating with this communication speed key. The *Letter* method is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Letter*, you can modify these translate values.

Direction
: Specify the direction of the communication you are associating with this communication speed key. The *Outgoing Communication* direction is required when generating letters.

Values for this field are delivered with your system as translate values. Except for the value of *Outgoing Communication*, you can modify these translate values.

Letter Code	Enter the code, from the Standard Letters page, for the communication that you are associating with this communication speed key.
Comments	Enter comments to further describe or identify the communication to associate with this communication speed key.
Print Comment	Select this check box to include or print the comments on the Comments pages in the communication associated with this communication speed key.
Activity Completed	Select this check box to make the status of *Complete* available with this communication speed key. This option is useful when data for a communication is typically entered after the activity is completed. For example, if the communication is an incoming phone call or an incoming letter, then the communication is already complete when you report it in the system.
Unsuccessful Outcome	Select this check box to make the status of *Unsuccessful* available with this communication speed key. For example, if you were to hold a telephone fund-raising event, you might want to record each call to track your success rate. You could create two communication speed keys—one for successful phone calls and one for unsuccessful phone calls.

Note. Before users can use the communication speed keys defined here, the communication speed key codes must be assigned in the users' defaults.

Setting Up the Communication Generation Process

To set up the Communication Generation process, use these components: Communication Data Source (SCC_CG_DTASRC), Report Definition (PSXPRPTDEFN), Organization Recipient Usage (ORG_RCP_USAGE), Name Usage Table (NAME_USAGE_TABLE), and Address Usage Table (ADDR_USAGE_TABLE).

This section provides an overview of setting up the Communication Generation process and discusses how to:

- Create a template.
- Create valid PeopleSoft queries and application classes.
- Create a data source file.
- Create a report definition.
- Define organization communication recipient usages.

Understanding the Communication Generation Process Setup

You can set up your PeopleSoft system to generate letters and emails using the Communication Generation process. The process uses Oracle BI Publisher included in PeopleSoft PeopleTools. To use Oracle BI Publisher with PeopleSoft Campus Solutions Communication Generation process, you must set up the elements as described in this section.

The concept of setting up the Communication Generation process includes the following steps:

1. Create a draft template and identify which variables to include.
2. For each variable, identify the corresponding record fields from which to get the data.
3. Create one or more queries or application classes to use to select the record fields.
4. Create a communication data source from within Campus Community and specify the queries or application classes to use for that data source.
5. Finalize the template using either the delivered Oracle BI Publisher template builder for Microsoft Word to create RTF templates or other software to create other template formats such as PDF by adding the variable tags from the data source.
6. Create a report definition to upload the template and associate it with the communication data source.
7. Associate a letter code with the report definitions that include the templates and communication data sources that you want to make available for generating the communication.

Pages Used to Set Up the Communication Generation Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Communication Data Source	SCC_CG_DTASRC	• Campus Community, Communications, Set Up Communications, Communication Data Source • Set Up SACR, Common Definitions, Communications, Communication Data Source	Identify the source to use and specify the fields to extract data from that source. The extracted fields can be specific to one template or can be reused in multiple templates. Also use the Communication Data Source to identify what record fields the Communication Generation process should consider critical data for producing the outputs. **Note.** For the Communication Generation process to succeed, you must create the data source from the Communication Data Source page inn PeopleSoft Campus Community. Do not create the data source from within PeopleTools.
Definition	PSXPRPTDEFN	Reporting Tools, XML Publisher, Report Definition	Define a report to associate the data source and the Oracle BI Publisher template. See *PeopleTools: Oracle BI Publisher for PeopleSoft*
Template	PSXPRPTTMPL	Reporting Tools, XML Publisher, Report Definition, Template	Identify the Oracle BI Publisher templates into which to merge data from the source file. See *PeopleTools: Oracle BI Publisher for PeopleSoft*
Output	PSXPRPTOUT	Reporting Tools, XML Publisher, Report Definition, Output	Select the PDF option on the Output page to include report definitions that must be printed. PeopleTools Oracle BI Publisher supports only PDF files for printing. See *PeopleTools: Oracle BI Publisher for PeopleSoft,*

Page Name	***Definition Name***	***Navigation***	***Usage***
Bursting	PSXPRPTBURST	Reporting Tools, XML Publisher, Report Definition, Bursting	Enter the Burst By value to separate the outputs that the Communication Generation process generate. The value of *fld_CG_SORT_ORDER* is the only available or valid value for a Report Definition that is associated with a data source that was created through Campus Community's Communication Data Source component. If you enter a different value or if you leave the field blank, the Communication Generation process will force the bursting value to *fld_CG_SORT_ORDER* at run time. The process uses the bursting value for several reasons including to separate the outputs that it generates and send them to the printer according to the order specified on the Communication Generation run control page. Bursting and ordering are required for producing letter and email outputs from the Communication Generation process. See *PeopleTools: Oracle BI Publisher for PeopleSoft*
Org Communication Recipient Usage Table	ORG_RCP_USAGE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Organization Recipient Usage, Org Communication Recipient Usage Table	Define usages for recipients of communications assigned to organizations when no recipient is specified.
Name Usage	NAME_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Name Usage Table	Define name usages to specify the hierarchies of name types that you want to use in a specific usage.

Page Name	Definition Name	Navigation	Usage
Address Usage	ADDR_USAGE_TABLE	Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Address Usage Table	Define or review address usages by specifying hierarchies of address types or email type to search for and use in a specific usage.

Creating a Template

You cannot automatically convert a Microsoft Word letter template designed for the Letter Generation process to a template for the Communication Generation process. However, you can use the Letter Generation template to determine which record fields need to be extracted and include them in a communication data source for an Oracle BI Publisher template for Communication Generation process.

See *PeopleTools: Oracle BI Publisher for PeopleSoft,* "Creating Report Templates,"Creating RTF Templates

Creating Valid PeopleSoft Queries and Application Classes

Create queries or application classes to identify the record fields to use to extract data to place in a template. You assign queries and application classes to the communication data source that you associate with the letter code to use. You can reuse queries and application classes for different letter codes.

Queries

Use PeopleSoft Query Manager to create queries based on the administrative function used in the associated communication data source. The system evaluates each query when you register the communication data source and registers only the queries that it validates can be successfully executed by the Communication Generation process.

See *PeopleTools: PeopleSoft Query.*

If you require criteria to be supplied at run time, create query prompts and add them as criteria to your query definition. The process can accept only query prompts for retrieving person and organization IDs and their variable data associated with the administrative function that is specified in the communication data source. You can also include the Communication record in your query and use the SEQ_3C field as a prompt to access values from the Communication record.

Warning! You must include at least query prompts that retrieve person ID or organization ID or a combination of the two.

While creating the query, after identifying the fields to use as prompts, you must click the Edit button on the corresponding Prompts page of the Query Manager component, and change the value in the Unique Prompt Name field to a value that will prompt for the desired data. This is the only way the process will know what data to pass to the prompt list.

To prompt for person ID, enter the Unique Prompt Name of *PERSON_ID.*The typical key field for persons in transaction tables is EmplID. However, entering *PERSON_ID* enables the process to select person data from tables with a different person ID key field. The process searches for *PERSON_ID* and assigns the COMMON_ID for person communications to the query prompt.

To prompt for organization ID, enter the Unique Prompt Name of *ORG_ID.* The typical key field for organizations in transaction tables is EXT_ORG_ID. However, entering *ORG_ID* enables the process to select organization data from tables with a different organization ID key field. The process searches for *ORG_ID* and assigns the COMMON_ID for organization communications to the query prompt.

To prompt for both person and organization ID, enter the Unique Prompt Name of *COMMON_ID.* The typical key field used in shared transaction tables is COMMON_ID. Entering *COMMON_ID* enables the process to select person and organization data from shared tables with a different common ID key field. The process searches for *COMMON_ID* and assigns the COMMON_ID for person and organization communications to the query prompt. The process uses the SA_ID_TYPE field at run time to place the COMMON_ID for the communication into the correct person or organization query prompt field.

To use values from the Communication table to join with other data tables in your query, you can create a prompt for the communication sequence field (SEQ_3C). For this field, enter the Unique Query Prompt of *SEQ_3C.*The process searches for*SEQ_3C*and assigns the SEQ_3C for the communication to the query prompt.

For example, to join to the Communication table in your query criteria, write:

```
select A.FIELD1, A.FIELD2
from PS_SCC_TABLE A, PS_COMMUNICATION B
where A.INSTITUTION = B.INSTITUTION
and A.EMPLID = B.COMMON_ID
and B.COMMON_ID = Query Prompt1
and B.SEQ_3C = Query Prompt2
```

This joins a transaction table PS_SCC_TABLE, which is keyed by INSTITUTION and EMPLID, to the PS_COMMUNICATION table to resolve the institution value for the communication being generated.

To use variable data from the communication to prompt for administrative function data, create a query prompt for the variable data fields associated with the administrative function specified in the communication data source. Enter the variable data field name in the Unique Prompt Name field. The process searches for the field name and assigns the variable data for the communication to the query prompt.

For example, assume that the communication data source uses the ADMA (Admissions Application) administrative function. ADMA has a dedicated table called VAR_DATA_ADMA. The variable data fields on the table that are assigned for this type of communication are ACAD_CAREER, STDNT_CAR_NBR, and ADM_APPL_NBR. To prompt for the ACAD_CAREER field, enter a Unique Prompt Name of *ACAD_CAREER.*

Warning! You must list each prompt that you create as criteria in the Criteria page of the Query Manager component.

After you create the query definitions, you can include them in a communication data source. When you click the Register Data Source button on the Communication Data Source component, the system evaluates each query and registers only the queries that are executable by the Communication Generation process. The system compares the setup of the query prompts with the information in the Data Source Context of the Communication Data Source as follows:

1. Validate Person/Organization check boxes:

    - Person only: Valid Unique Prompt Names include*PERSON_ID,COMMON_ID,* and *SEQ_3C.*
    - Organization only: Valid Unique Prompt Names include *ORG_ID,COMMON_ID,* and *SEQ_3C.*
    - Person and Organization combined: Valid Unique Prompt Names include *PERSON_ID,ORG_ID, COMMON_ID,* and *SEQ_3C.*

2. Validate Administrative Function value: Valid Unique Prompt Names include the record.field *VAR_DATA_%.FIELDNAME* where *%* is the value of the administrative function used in the Data Source Context. The valid values are the field names used in the dedicated Variable Data table for the specified administrative function.

After registering the data in the Communication Data Source, the output from the query is appended at the end of the generated sample data file and is ready for use in an Oracle BI Publisher template.

Note. If you need to manipulate your custom extract data in ways that cannot be accomplished using PS Query, you can use PeopleTools Application Designer to create application classes (App Classes), which are also compatible with the Communication Generation process.

See *PeopleTools: PeopleCode API Reference, "Application Classes."*

Application Classes

Use PeopleTools Application Designer to create custom application classes to extract and manipulate data using standard PeopleTools logic. Each application class can be created with your own validation logic to assure that it can be successfully executed by the Communication Generation process.

See *PeopleTools: PeopleCode API Reference, "Application Classes."*

When you create a custom PeopleTools application class to use in a Communication Data Source, you must include methods required by the Communication Generation process. You can insert your own PeopleCode logic into the required methods to extract and manipulate the data to include in your Communication Data Source. You can also create and call your own methods in addition to the required methods.

The PeopleSoft system delivers a base application class called *CommGenDSAbstract* to use in the creation of all custom application classes for the Communication Generation process. This application class is never called directly, but provides the structure for creating all custom application classes for use with the process. The system also delivers a sample application class named *AppClassAdapter,* which was created from the base.

Follow these steps to access the base and sample application classes:

1. Open the *SCC_COMMGEN* application package in Application Designer.

2. Access the*Model* sub package.

3. Within the Model sub package, access the *CommGenDSAbstract* application class, which is the base application class.

4. Within the Model sub package, access the *DSAdapters* package.

5. Within the DSAdapters package, access the *AppClassAdapter* application class, which is the sample application class.

Follow these steps to create a custom application class that is valid for the Communication Generation process:

1. The application class must inherit the structure of the base *CommGenDSAbstract* application class.

   For example, the sample application class *AppClassAdapter* implements SCC_COMMGEN:Model:CommGenDSAbstract.

2. At a minimum, you must use the following two methods:

   - The Validate method `Method Validate(&strContext As string, &arrValidBindFields As array of any)` which will be called when the user clicks the Register Data Source button on the Communication Data Source page. No further validation code is required. The method will always be passed the Data Source Context (person, organization, or both) and an array of the variable data field names associated with the administrative function selected in the context.

     For example, assume that you want to validate that the custom application class is used only in Communication Data Sources where only the Person check box is selected in the Data Source Context. The variable`&strContext` which is passed into the method contains each of the following values:

     P for Person Communications

     O for Organization Communications

     PO for Person and Organization Communications combined.

     You can issue an error message to the user if the context of the Communication Data Source is for organizations *(O)* or both *(PO)*.

   - The BuildAdapterRowset method`BuildAdapterRowset(&rowResult As Row, &booVarData As boolean) Returns Rowset` which will be called when the Communication Generation process runs. The method will always be passed a PeopleCode row object containing communication and variable data information for the communication in context. It will also be passed a Boolean value of *True* or *False* indicating whether the Communication Data Source uses an administrative function that contains variable data. While most administrative functions have associated variable data, some do not. For example, the GEN (general) administrative function does not.

     This method will always return a rowset PeopleCode object to be appended to the extract data. The rowset object that you construct can be of any PeopleTools supported structure.

     The *AppClassAdapter* example application class uses the keys from the communication (COMMON_ID, SEQ_3C) to join to the Communication table and extract the descriptions for the institution. This is the institution by which the communication was assigned.

     Warning! You can create new application packages that contain any number of custom application classes for use in building custom extract data for the Communication Generation process, but you should not modify the delivered *SCC_COMMGEN* application package when creating your own custom application classes.

After you create the custom application classes, you can include them in a communication data source by selecting the Type of *App Class*.on the Communication Data Source page. When you click the Register Data Source button, the systems evaluates each application class and registers only the application classes that are executable by the Communication Generation process.

The system evaluates and validates each application class as follows:

1. Instantiate the custom App Class object.

   If the path is incorrect or the application class does not exist, a standard PeopleTools error message appears stating that the object could not be opened.

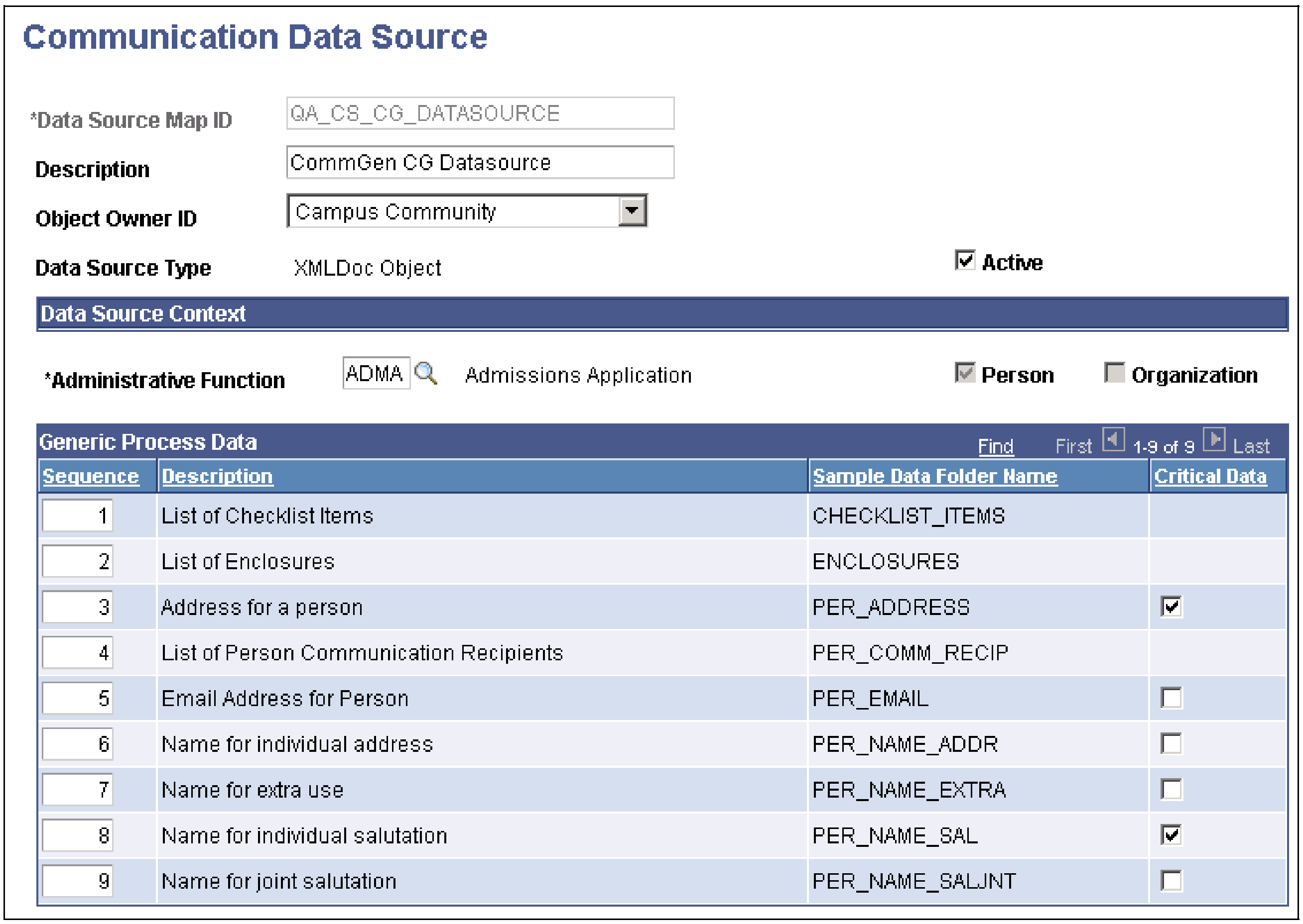
2. Call the Validate method for the custom application class, and perform the code check, if any.

After registering the data in the Communication Data Source, output from the application classes is appended at the end of the generated sample data file and is ready for use in an Oracle BI Publisher template.

See *PeopleTools: PeopleCode API Reference, "Application Classes."*

Creating a Data Source File

Access the Communication Data Source page (Campus Community, Communications, Set Up Communications, Communication Data Source).



Communication Data Source

*Data Source Map ID: QA_CS_CG_DATASOURCE

Description: CommGen CG Datasource

Object Owner ID: Campus Community

Data Source Type: XMLDoc Object

Active

Data Source Context

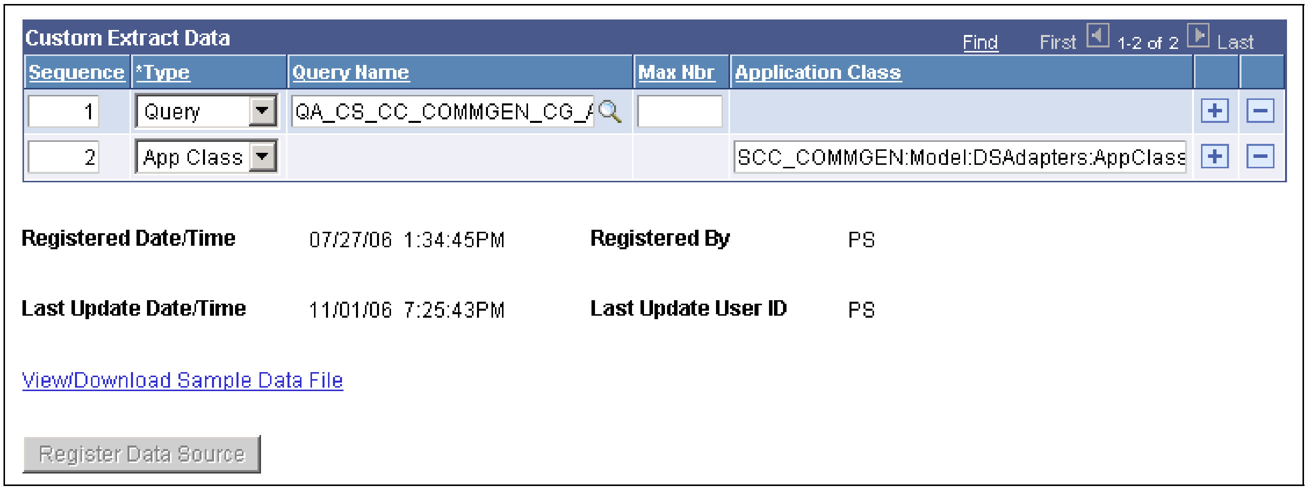
*Administrative Function: ADMA Admissions Application

Person Organization

Generic Process Data Find First 1-9 of 9 Last

Sequence	Description	Sample Data Folder Name	Critical Data
1	List of Checklist Items	CHECKLIST_ITEMS	
2	List of Enclosures	ENCLOSURES	
3	Address for a person	PER_ADDRESS	☑
4	List of Person Communication Recipients	PER_COMM_RECIP	
5	Email Address for Person	PER_EMAIL	☐
6	Name for individual address	PER_NAME_ADDR	☐
7	Name for extra use	PER_NAME_EXTRA	☐
8	Name for individual salutation	PER_NAME_SAL	☑
9	Name for joint salutation	PER_NAME_SALJNT	☐

Communication Data Source page (1 of 2)



Communication Data Source page (2 of 2)

Data Source Map ID

Displays the unique mapping ID that links the Oracle BI Publisher data source to the Communication Generation process metadata.

If you are creating a new data source, the system temporarily displays what you entered when you chose Add a New Value.

When you click the Register Data Source button to save and register the data source, the system creates or updates the Data Source Map ID and displays it here.

Warning! For the Communication Generation process to run successfully, you *must* create and update the data source from within Campus Community as described in this section. Do *not* create the data source from within PeopleTools Oracle BI Publisher. The Register Data Source button on the Communication Data Source page in Campus Community automatically stores the data source inside the PeopleTools tables. This button also keeps the data source created within Campus Community synchronized with the information in the PeopleTools tables for you.

Object Owner ID

(Optional) Enter the PeopleSoft product responsible for this data source and the map ID.

Data Source Type

Displays *XMLDoc Object*, which is the only type of object that the Communication Generation process processes. You cannot change this value.

The system requires this information to access the data source from the Tools Data Source component Oracle BI Publisher.

Active

Select to make the data source active and available to users. Clear to preserve the definition but prevent the data source from being available to users.

Data Source Context

Information in this group box shows in which context the data source can be used.

Administrative Function	Enter the administrative function to use for this data source. The administrative function is used to filter which data source will be available for which Letter Code. The value selected identifies whether the communication can be sent to a person, an organization, or both.
Person and **Organization**	The system indicates the types of IDs that can receive communications based on the administrative function. If the function permits communications with both persons and organizations, both check boxes are available for editing. You can select or clear the check boxes to limit the communications to either persons only or organizations only.

Generic Process Data

The system lists the generic data that the Communication Generation process must always extract to accommodate all of the Campus Solutions communication features. The data varies depending on whether the context is for a person, an organization, or both. Each of the features is associated with the names of the records into which the extracted data will be placed for the Oracle BI Publisher templates. You can prioritize the order of the records using sequencing, but you cannot add or delete any of them.

Click the Critical Data check box to identify the generic data to include as critical to the creation of the output for individual or organization recipients. On the run control page, administrative users can specify what to do if critical data is missing: either to process the communication without the data or not to process the communication for IDs that are missing the data. Checklists, enclosures, and person communication recipients cannot be specified as critical data.

Custom Extract Data

You can use queries or application classes to identify additional data to extract. You can use multiple queries, application classes, or combinations of both.

Type	Enter the type of tool to use to identify the data to extract, either *Query* or *App Class.* Do not add values or modify the delivered values.
Query Name or **App Class Name**	The field name changes based on the Type selected, either *Query* or *App Class.* For the Query Name field, available values are limited to queries to which the user has security access. The Register Data Source feature evaluates each query and registers only the queries that it validates to as executable by the Communication Generation process. For the App Class Name field, enter the application class in the same format as the sample application class, which is *SCC_COMMGEN:Model:DSAdapters:AppClassAdapter.*

Max Nbr (maximum number)

(For queries only.) Enter the maximum rows of data for the query to extract.

Note. To extract all the possible values for an ID, leave the Max Nbr field blank. For example, if your query includes the ACAD_CAREER field and an ID has an application for 5 different academic careers, when the field is blank the query will extract 5 of the values. If you want to extract only 2 values, set the maximum number to *2*.

The MaxNbr field on the Communication Data Source page does not apply when you are using an application class for custom extract data. PeopleTools does not support the ability to restrict the number of rows selected into a Standalone Rowset by simply passing a maximum number into the Rowset Fill method. You can control the number of rows of data to append to the extract either within the selection criteria or by manipulating the Standalone Rowset after it has been filled.

View/Download Sample Data File

Available only after the data source is registered.

Click to view the Oracle BI Publisher file to determine where the sample data placeholders are for the data to extract.

You must download the Oracle BI Publisher file and load it into the XML templates using the delivered design helper tool. The file contains all the fields that the Communication Generation process will extract. You can include these fields as variables in your templates. The collapsible sections in the XML file correspond to the folder names listed in the Generic Process Data group box in the Communication Data Source page. If the Communication Data Source includes a query or application class, the query or application name appears in the list at the end of the XML file.

See *PeopleTools: Oracle BI Publisher for PeopleSoft, "Creating Report Templates."*

Register Data Source

Click to create or update the data source ID in the PeopleTools record. When you do, theRegister Data Source button becomes unavailable, the View/Download Sample Data File link appears, and the system populates the audit information fields with the date and the user ID who registered the data.

To ensure that the data source created in the Campus Community component remains synchronized with the data source stored in the PeopleTools record, each time you make a change to the Campus Community data source, the system hides the View/Download Sample Data File link, reactivates the Register Data Source button and displays a message telling you to click the Register Data Source button to update the Oracle BI Publisher data source. When you click the Register Data Source button again, the system recreates the sample data file and updates the PeopleTools record for you.

You can make as many changes as you want, but you must register the data source again for the system to accept and use the changes and for the system to update the Data Source Map ID in the PeopleTools record.

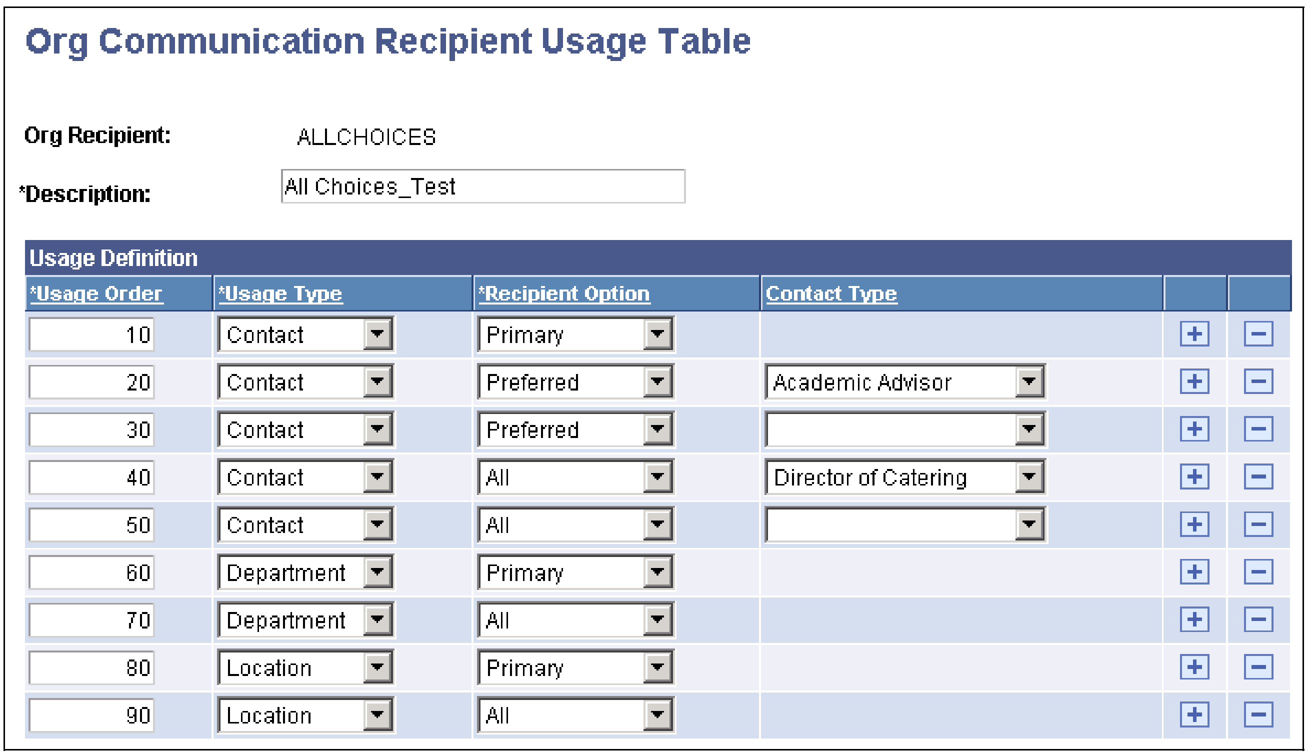
Creating a Report Definition

You must define a report and associate with it, the communication data source from which to extract data and the Oracle BI Publisher templates into which you want to merge the extracted data. Report definitions are a function of PeopleTools Oracle BI Publisher Reporting Tools, XML Publisher, Setup, Report Definition.

You must associate the report definition with the letter code to use so that the Communications Generation process knows which template and data source to use to create the communication.

Defining Organization Communication Recipient Usages

Access the Org Communication Recipient Usage Table page (Set Up SACR, Product Related, Campus Community, Establish People Processing, Setup, Organization Recipient Usage, Org Communication Recipient Usage Table).


Org Communication Recipient Usage Table

Org Recipient: ALLCHOICES

*Description: All Choices_Test

Usage Definition

*Usage Order	*Usage Type	*Recipient Option	Contact Type
10	Contact	Primary	
20	Contact	Preferred	Academic Advisor
30	Contact	Preferred	
40	Contact	All	Director of Catering
50	Contact	All	
60	Department	Primary	
70	Department	All	
80	Location	Primary	
90	Location	All	

Org Communication Recipient Usage Table page

Set up prioritized usages for the Communication Generation process to use to identify recipients if no recipients are specified on the Org Communication Management page.

Enter a Usage Type to send the communication to a *Contact,Department,* or *Location* for an organization.

After you select the Usage Type, use theRecipient Option field to specify whether to send the communication to *All,* to the *Preferred,* or to the *Primary* contact, department, or location.

If you select a Recipient Option of *Contact,* use the Contact Type field to specify the type of contact. For example, to define a usage order to send the communication to all contacts who are academic advisors, enter a Usage Type of *Contact,* a Recipient Option of *All,* and a Contact Type of *Academic Advisor.*

Usage Type, Recipient Option and Contact Type values are translate values. They should not be modified.

Chapter 23

Setting Up Comments

This chapter provides an overview of comment setup, lists prerequisites and common elements, and discusses how to:

- Set up comment categories.
- Define 3C update/inquiry groups.
- Set up 3C comment groups.

Understanding Comment Setup

To attach comments to records, you must first create comment categories and associate them with 3C groups to define who, at your institution, has the security access to write, review, or change comments.

You can assign comments to individuals and organizations manually, or you can use the 3C engine to automatically assign comments to individuals or organizations based on rules and conditions that you define.

Prerequisites

Before defining comment categories and associating them with 3C groups, you must understand and set up administrative codes, 3C group security, and assign individuals to specific 3C groups.

Common Elements Used in This Chapter

Administrative Function	The code for the administrative area with which the comment category is associated.
3C Group	The comment group to which a user has security access.

Setting Up Comment Categories

To set up comment categories, use the Comment Category Table component (CMNT_CATG_TBL).

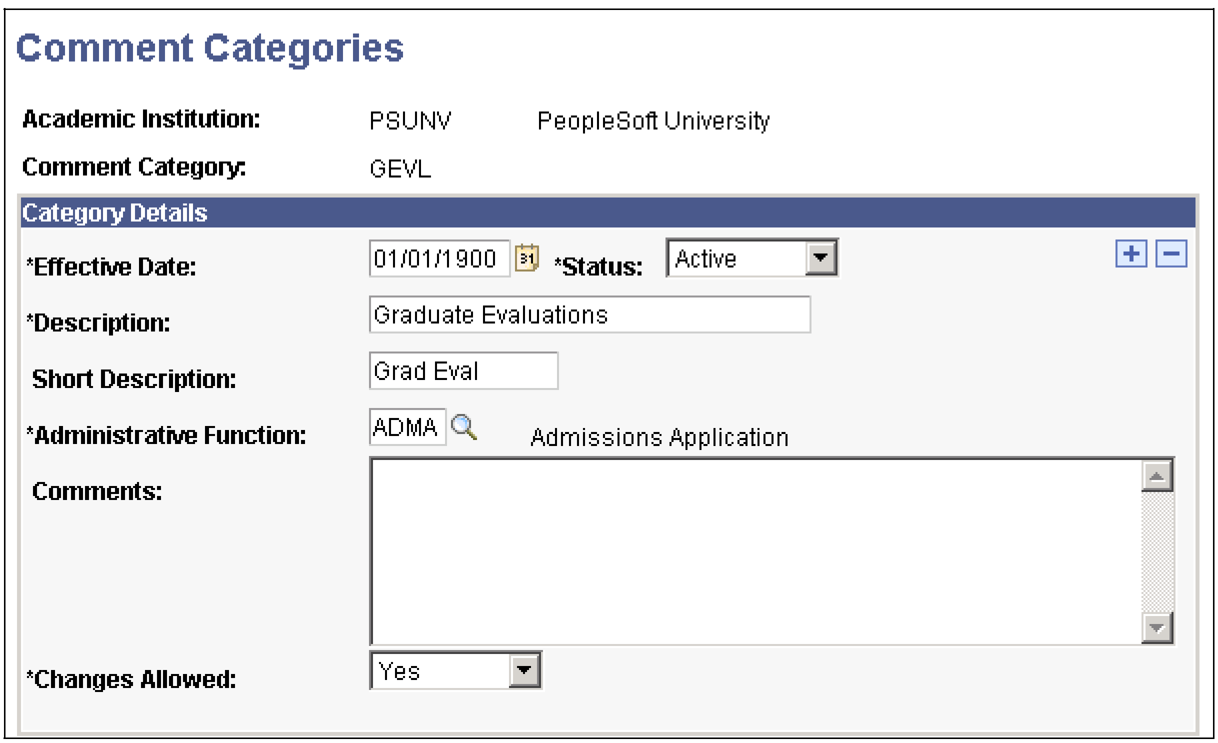
This section discusses how to define comment category codes.

Page Used to Set Up Comments

Page Name	***Definition Name***	***Navigation***	***Usage***
Comment Categories	CMNT_CATG_TABLE	• Set Up SACR, Common Definitions, Comments, Comment Category Table • Campus Community, Comment, Set Up Comments, Comment Category Table	Define categories that enable you to group comments for similar purposes.

Defining Comment Category Codes

Access the Comment Categories page (Campus Community, Comment, Set Up Comments, Comment Category Table).



Comment Categories page

Category Details

Administrative Function	Enter the code for the administrative area with which this comment category is associated. Available function codes are from the Administrative Functions page.
Comments	Enter the default comment to use when this comment category is assigned to an individual.
Changes Allowed	Indicate whether users should be permitted to change the default comment associated with this comment category. The default value is *Yes.* You can override this value. *Append:* Users can add to the default comment, but cannot change or edit it. *No:* Users cannot change, edit, or add to the default comment.

Defining 3C Update/Inquiry Groups

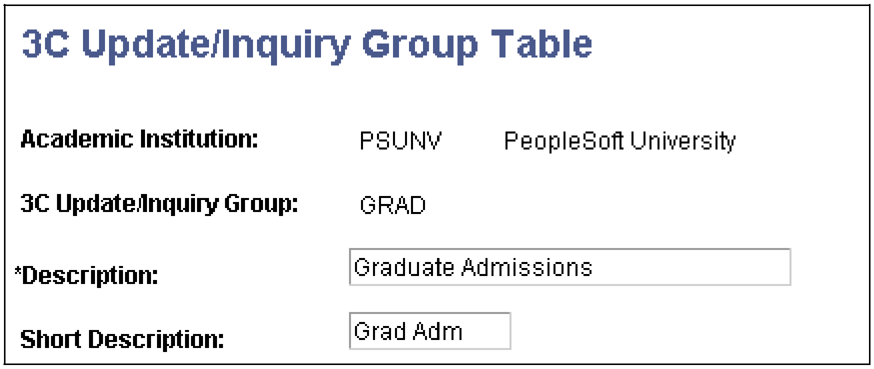
To define 3C Update/Inquiry Groups, use the 3C Update/Inquiry Groups component (GROUP_3C_TBL).

Page Used to Define 3C Update/Inquiry Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Update/Inquiry Group	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of IDs who have similar interests and needs.

Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Groups page (Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table).



3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a comment category to create a Comment 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

Setting Up Comment 3C Groups

To set up comment 3C groups, use the Comment 3C Groups component (CMNT_GRP_3C_TBL).

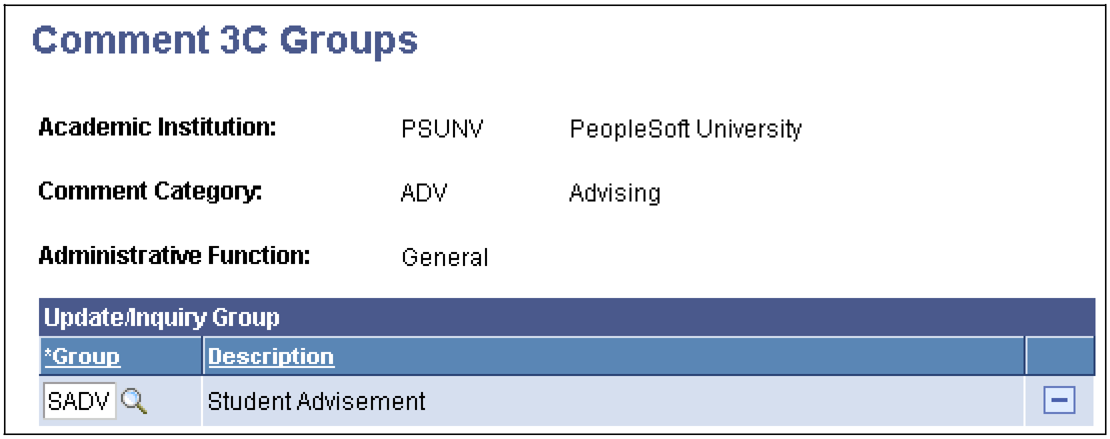
This section discusses how to create a comment 3C group.

Page Used to Set Up Comment 3C Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Comment 3C Groups	CMNT_GRP_3C_TABLE	• Set Up SACR, Common Definitions, Comments, Comment 3C Groups • Campus Community, Comments, Set Up Comments, Comment 3C Groups	Associate one or more 3C update/inquiry groups with a comment category.

Creating a Comment 3C Group

Access the Comment 3C Groups page (Set Up SACR, Common Definitions, Comments, Comment 3C Groups).



Comment 3C Groups

Academic Institution: PSUNV PeopleSoft University

Comment Category: ADV Advising

Administrative Function: General

Update/Inquiry Group

*Group	Description	
SADV	Student Advisement	

Comment 3C Groups page

Chapter 24

Setting Up Checklists

This chapter provides and overview of setting up checklists, lists prerequisites, and discusses how to:

- Set up checklist items.
- Associate checklist items with administrative functions.
- Set up checklist tracking groups.
- Set up checklist templates.
- Define 3C update/inquiry groups.
- Set up checklist 3C groups.

Understanding Checklist Setup

To create checklists, you must set up checklist items. You can assign a responsible person, a status, and a due date to each checklist item. You can then relate multiple checklist items to a specific checklist and assign a due date for the overall checklist. You can also associate checklist items with an administrative function and use that function to enter some or all of the items as a subset of items on a larger, more comprehensive checklist with its own overall due date. In addition, you can combine several checklists into one monitoring unit called a tracking group.

You can make the checklist items as general or as specific as you want. For example, checklist items might include an admission application that a student needs to submit, a letter that a member of your staff needs to write, or a phone call that a staff member needs to make.

You can associate a checklist item with multiple administrative functions. However, when you use an administrative function to create a checklist, you can enter only the checklist items associated with that administrative function.

You can combine several checklists within the same administrative function into one unit for fast, organized monitoring. For example, if you were to create a checklist of items typically required for an admissions application, you might begin by creating a checklist item for receiving the individual's ACT or SAT 1 test scores. You might also set checklist item codes for the application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To set up the checklist item code for receiving ACT or SAT 1 test scores:

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Item Table.
2. Enter a checklist item code, such as *ACTSAT.*

3. Enter a description to identify the checklist item.

   In this case, you might enter *ACT or SAT 1 Test Scores.*

4. Enter a short description.

   If you do not enter a short description, the system enters one based on the description.

5. Enter a long description to provide more information about the checklist item or to enter a comment.

   If you use this checklist item as part of generating a letter, the data in the long description is included in the letter generation output data. You can specify whether to print it in the letter.

   and Chapter 48, "Managing Communications," page 775.

After you create the checklist item code for the offer letter, you can continue creating checklist item codes for each item that you want on your checklist. When you are finished setting up checklist items, you can set up checklist function items.

You can associate a set of checklist items with a particular administrative function. You can then use that administrative function to indicate a subset of checklist items that you want to include in a larger checklist.

For example, you could associate a set of checklist items with the function of Admissions Application. These checklist items might include the ACT or SAT 1 test scores, application fee, references checked, a meeting arranged with a mentor, and career and placement discussion held.

To associate the ACT or SAT 1 test scores checklist item with the administrative function of Admissions Application:

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Function Item Table.

2. Enter the administrative function, such as *ADMA.*

3. Enter the item code of the first checklist item that you want to associate with this function, in this case, ACT/SAT.

   Continue to associate relevant checklist items with this function. You can associate many checklist items with a function. You can also choose other functions, and associate checklist items with each of them.

After all checklist items are associated with an administrative function, you must group the checklist items into checklists, which you can then assign to individuals or organizations. When you assign a checklist code to an individual or organization, the system assigns each of the checklists items in that code to that individual or organization.

In our example, you want to create a checklist code of UGALL for all undergraduate requirements, and include the checklist items ACT and SAT 1.

1. Select Set Up SACR, Common Definitions, Checklists, Checklist Table.

2. Enter the checklist code that you want to create and the function from which you want to select checklist items.

   For this example, the checklist code is *UGALL* and the function is *ADMA.*

3. Define what type of checklist this will be, such as Requirement List.

Additionally you can set up tracking groups. A tracking group provides a logical connection between the checklists that are associated with an individual. For example, you may have several checklists for the same student in the undergraduate applications function, but only some of those checklists are related to the student's loan requirements. You might want to monitor the status of the student's loan documents to determine when the loan document requirements are complete. When you create the checklist and assign a checklist code, you could also assign the checklist to a loan documents tracking group.

Users can access checklists only in the checklist categories to which you grant them 3C group security access.

Prerequisites

Before defining checklist items and associating them with functions, become familiar with administrative functions. Before using communication speed keys to create a checklist template, set up communication speed keys in your system.

Setting Up Checklist Items

To set up checklist items, use the Checklist Item Table component (CS_CHK_ITEM_TBL).

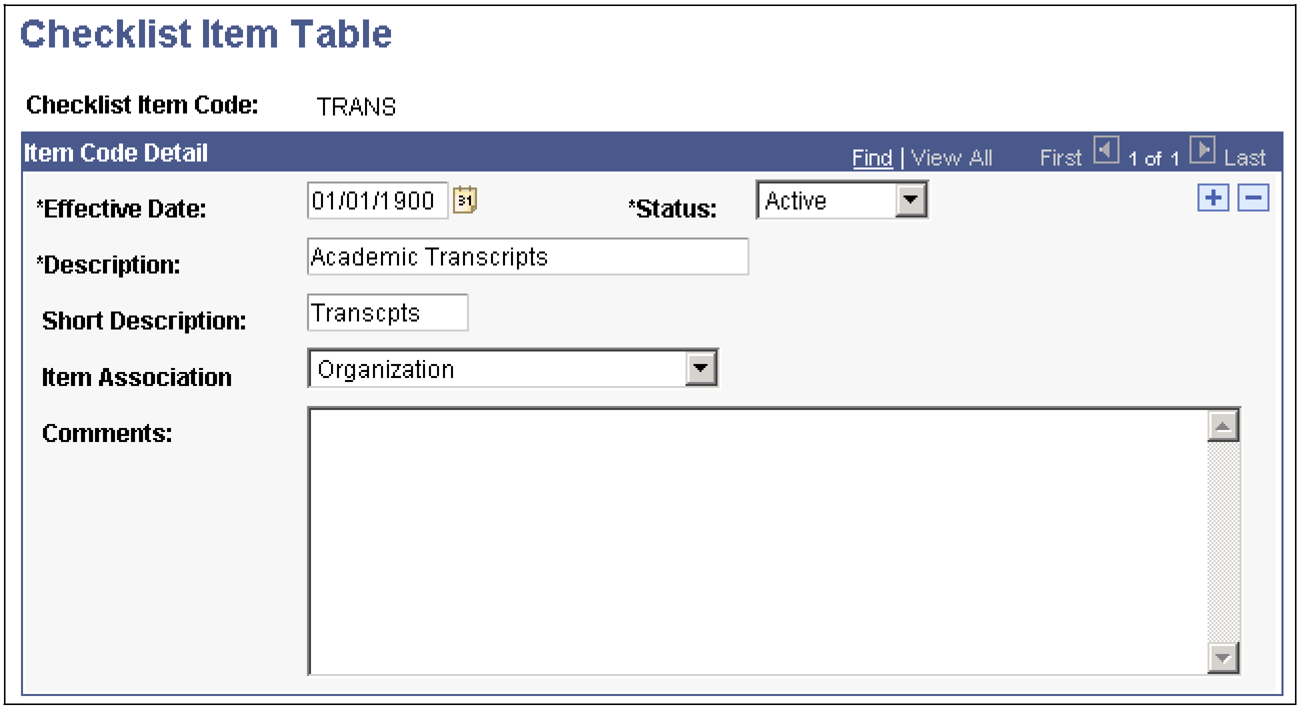
This section discusses how to define checklist items.

Page Used to Set Up Checklist Items

Page Name	***Definition Name***	***Navigation***	***Usage***
Checklist Item Table	SCC_CHECKLST_ITEM	• Set Up SACR, Common Definitions, Checklists, Checklist Item Table • Campus Community, Checklists, Set Up Checklists, Checklist Item Table	Define items to make available for checklists.

Defining Checklist Items

Access the Checklist Item Table page (Set Up SACR, Common Definitions, Checklists, Checklist Item Table).



Checklist Item Table page

Item Association

If the item is associated with a particular person or organization in any way, you can select either *Name* or *Organization* to indicate that.

The item association that you select here is used on checklist management pages when you assign checklists to IDs. Although you assign the checklist to the ID, you might want to know that an item must come from, or is in some other way associated with, another individual or organization. For example, you might assign a checklist item called *Transcript* to an individual, and that item might be created with an item association of *Organization.* On the checklist management page where you assign the checklist to the ID, you can identify the organization (for example, *PeopleSoft University)* from which that transcript is needed for the applicant to be admitted. This is especially helpful if you need to receive multiple transcripts for an applicant.

The Item Update - Automated process, which links checklist items with transcripts with general materials, such as recommendation letters, and with tests scores in PeopleSoft Recruiting and Admissions, also uses this.

Values for this field are delivered with your system as translate values. You should not modify these translate values.

Associating Checklist Items with Administrative Functions

To associate checklist items with administrative functions, use the Checklist Function Item Table component (CHK_FUNCTION_TABLE).

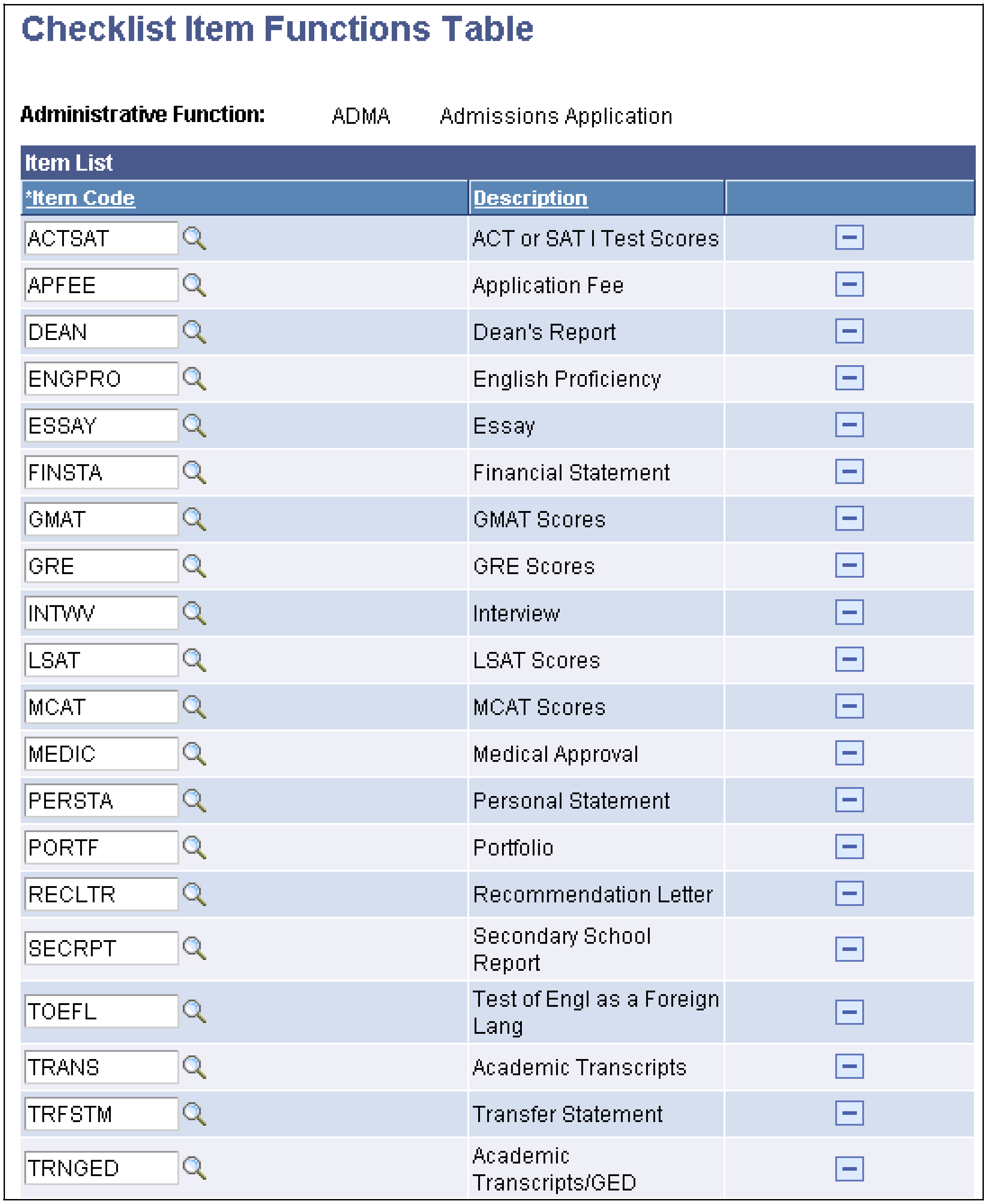
This section discusses how to associate items with a function.

Page Used to Associate Checklist Items with Administrative Functions

Page Name	*Definition Name*	*Navigation*	*Usage*
Checklist Item Functions Table	CHK_FUNCTION_TABLE	• Set Up SACR, Common Definitions, Checklists, Checklist Function Item Table • Campus Community, Checklists, Set Up Checklists, Checklist Function Item Table	Associate checklist items with an administrative function.

Associating Items with a Function

Access the Checklist Item Functions Table page (Set Up SACR, Common Definitions, Checklists, Checklist Function Item Table).



Checklist Item Functions Table page

Item Code

Enter the code for the checklist item associated with this administrative function.

Available item codes are from the Checklist Items page.

Setting Up Checklist Tracking Groups

To set up tracking groups, use the Tracking Group Table component (TRACK_GRP_TBL).

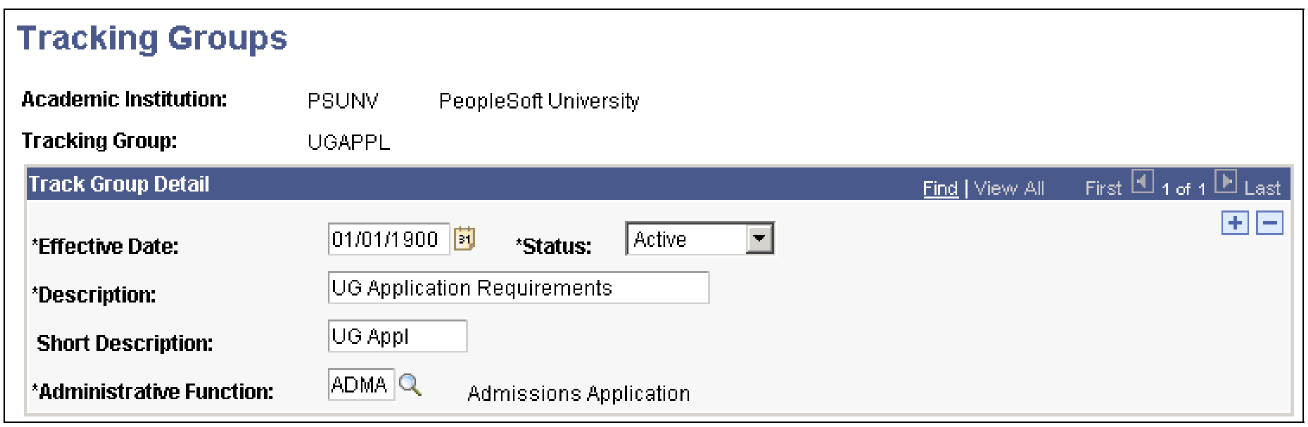
This section discusses how to create a tracking group.

Page Used to Set Up Tracking Groups

Page Name	***Definition Name***	***Navigation***	***Usage***
Tracking Groups	TRACK_GRP_TABLE	• Set Up SACR, Common Definitions, Checklists, Tracking Group Table • Campus Community, Checklist, Set Up Checklists, Tracking Group Table	Optionally create tracking groups by combining two or more checklists with the same administrative function into one monitoring unit.

Creating a Tracking Group

Access the Tracking Groups page (Set Up SACR, Common Definitions, Checklists, Tracking Group Table).



Tracking Groups page

Tracking groups are optional, but helpful for monitoring a group of checklists at the same time.

Note. You can assign only one tracking group per checklist, so you might not want to make your tracking groups too broad.

Administrative Function

Enter the code for the administrative area with which this tracking group is associated.

Checklists associated with the administrative functions that you select here are the only checklists that will be available in this tracking group.

Setting Up Checklist Templates

To set up checklist templates, use the Checklist Table component (CS_CHKLST_TBL).

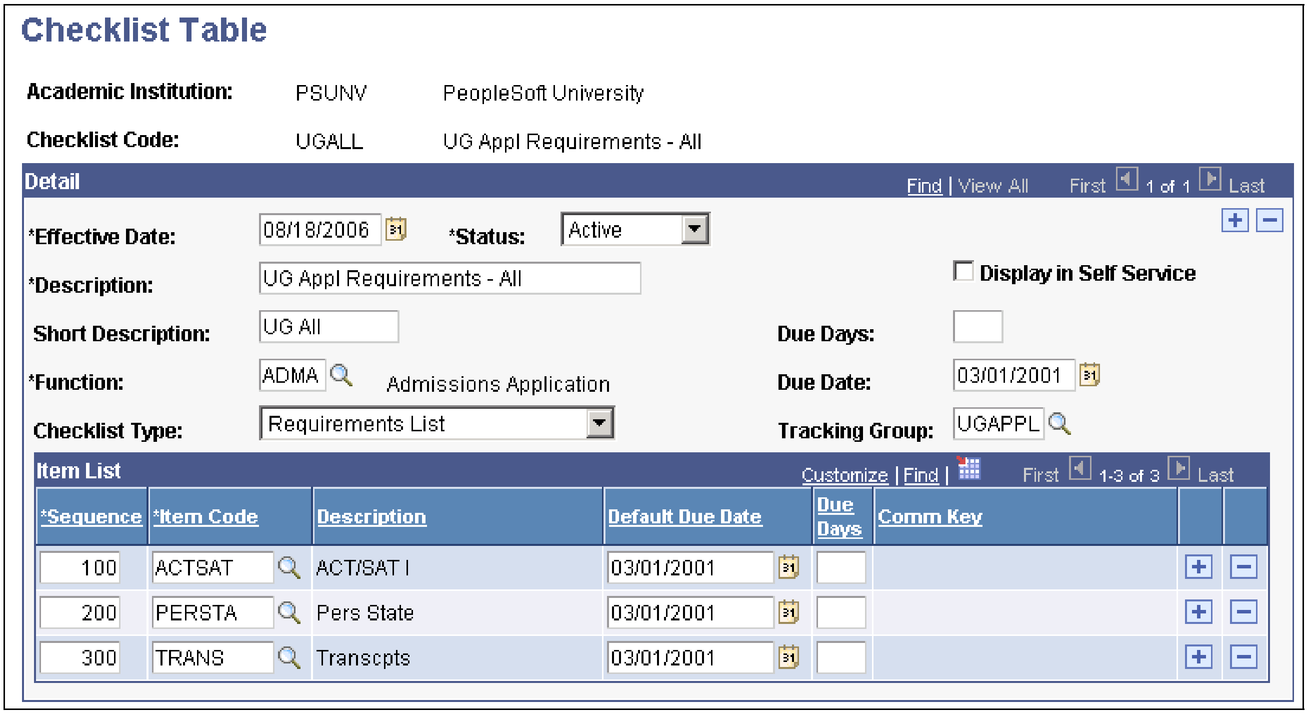
This section discusses how to create a checklist template.

Page Used to Set Up Checklist Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Checklist Table	CS_CHKLST_TABLE	• Set Up SACR, Common Definitions, Checklists, Checklist Table • Campus Community, Checklists, Set Up Checklists, Checklist Table	Create checklist templates and assign codes to them.

Creating a Checklist Template

Access the Checklist Table page (Set Up SACR, Common Definitions, Checklists, Checklist Table).



Checklist Table page

Detail

Function

Enter the code for the administrative area with which the items for this checklist are associated. The function code controls the item codes that you will be able to select.

Checklist Type

Select the type that best describes this checklist.

The following checklist types are delivered with your system as translate values:

(ADC) Condition List

(CML) Communication List

(HIR) Hiring

(MED) Medical

(PRM) Promise

(RQL) Requirements List

(SAL) Staff Assignment List

(TER) Termination

(TRN) Training

(XFR) Transfer

(OTH) Other

You can modify these translate values.

Of the delivered checklists types, the ones most relevant to the management of student administration and contributor relations are:

(CML) Communication List: A list of the communications (for example, letters, brochures, and phone calls) that have occurred with a person over a period of time.

(PRM) Promise: Records the amount and due dates of a person's promise-to-pay.

(RQL) Requirements List: A list of items that a student must accomplish or submit to move to the next step of a process. For example, the list might specify the materials required to complete an application to your institution. You can also use items from a requirements list in the letter generation process to notify students of missing application items.

(SAL) Staff Assignment List: A list of items that a staff member needs to accomplish relative to a particular student.

Display in Self Service

Select to display the checklist as a To Do item on PeopleSoft Campus Self Service pages.

Clear to prevent the checklist from appearing as a self-service To Do item.

Due Days

Enter the number of days, calculated from the assign date, by which all items on this checklist must be completed.

Due Date

The date by which all items on this checklist must be completed.

Tracking Group

(Optional) Enter the group to which this checklist should be assigned for monitoring.

Available group codes are from the Tracking Groups page.

Item List

Sequence

The number of this item in the list of items for this checklist.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number to reorder the list of checklist items.

Item Code

Enter the item code for this checklist item.

The item codes available are those associated with the selected administrative function on the Checklist Item Functions page.

Default Due Date

If you know the exact date when the checklist item is due, enter it here.

You can leave the field blank. If the field is blank when you save the record, the system displays the due date from the Detail area of the page as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Due Days

If an item is due within a specific number of days rather than on a specific date, enter the number of days here.

You can leave the field blank. If the field is blank when you save the record, the system displays the number of due days from the Detail area of the page as the default due days value for each checklist item. You can override this number, but it must be with a *smaller* number so that the item does not become due after the overall due date of the checklist.

Comm Key

When you create a checklist of the default type that is set on the Installation Default - CC page, the Comm Key field becomes available.

Select a Comm Key to assign the specified communications to the individual or organization to which you are also assigning the checklist. When you run the process to generate the letter whose letter code is associated with the Comm Key selected, the process extracts the checklist items listed on the checklist tied to the Comm Key. This enables you to print a list of the items not yet completed. For example, you could list in a letter the remaining items that an applicant needs to submit to complete the application.

Defining 3C Update/Inquiry Groups

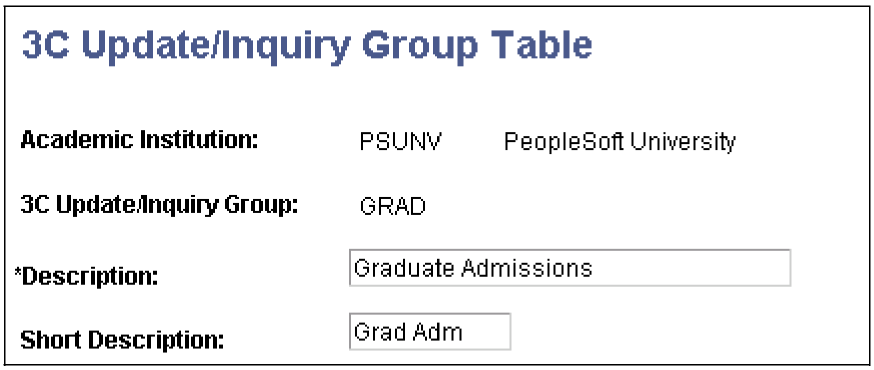
To define 3C Update/Inquiry Groups, use the 3C Update/Inquiry Groups component (GROUP_3C_TBL).

Page Used to Define 3C Update/Inquiry Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Update/Inquiry Group	GRP_3C_TABLE	Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table	Define a group of IDs who have similar interests and needs.

Defining a 3C Update/Inquiry Group

Access the 3C Update/Inquiry Groups page (Set Up SACR, Common Definitions, 3C Update/Inquiry Group Table).



3C Update/Inquiry Group Table page

Define a group of users who have similar needs and interests. You can then associate one or more 3C Update/Inquiry Groups with a checklist code to create a Checklist 3C Group.

Security Administrators give users security access based on 3C update/inquiry groups.

Setting Up Checklist 3C Groups

To set up checklist 3C groups, use the Checklist 3C Groups component (CS_CHKLST_3CGRP).

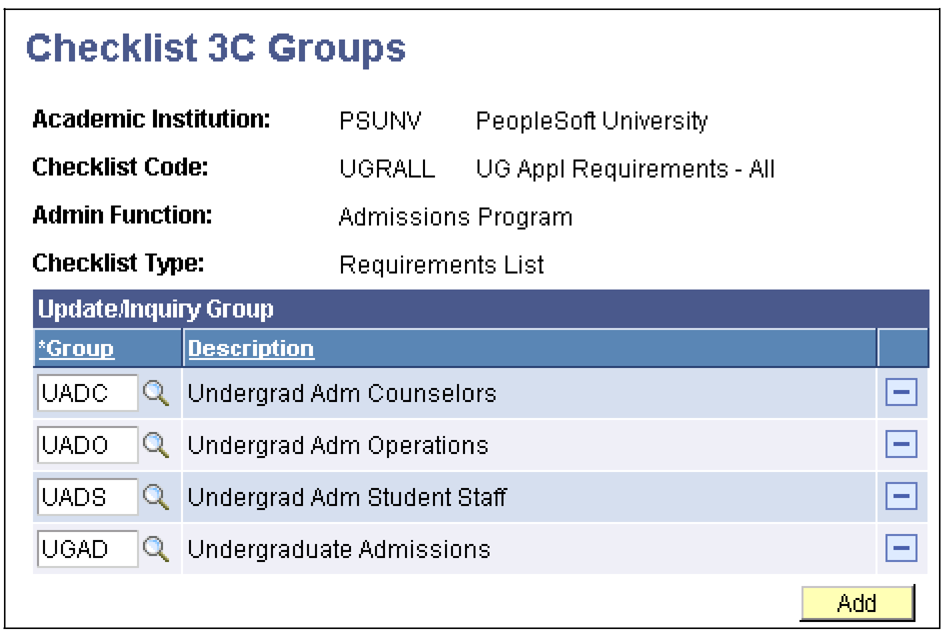
This section discusses how to create a checklist 3C group.

Page Used to Set Up Checklist 3C Groups

Page Name	*Definition Name*	*Navigation*	*Usage*
Checklist 3C Groups	CS_CHKLST_3CGRP	• Set Up SACR, Common Definitions, Checklists, Checklist 3C Groups • Campus Community, Checklists, Set Up Checklists, Checklist 3C Groups	Create checklist 3C groups to grant security access to checklists in your database.

Creating a Checklist 3C Group

Access the Checklist 3C Groups page (Set Up SACR, Common Definitions, Checklists, Checklist 3C Groups).



Checklist 3C Groups page

Chapter 25

Setting Up Committee Templates

This chapter provides an overview of committee templates and discusses how to set up committee types and roles.

Understanding Committee Templates

Within most organizations, committees are frequently created that share the same structure and the same member roles; only the set of people who should serve on those committees and their individual names change. Campus Community enables you to define the types of committees that your institution creates, identify the roles that should be on each committee, and then use the types and roles to create templates to help you create and manage committees across your institution.

For example, you can create a template for an undergraduate interviews committee type and associate the roles of chairperson and three interviewers with it. You might want members of this committee type to be recruiters and advisors, in which case you would associate all recruiter and all advisor records with the committee type to provide prompt lists from which to assign individuals to this committee. You then use the template to create a current or ongoing committee and assign individuals to the chair and member roles. You can also specify the dates during which each individual should participate in the committee.

Setting Up Committee Types and Roles

To set up committee types and roles, use the Committee Type/Role component (COMMITTEE_SETUP).

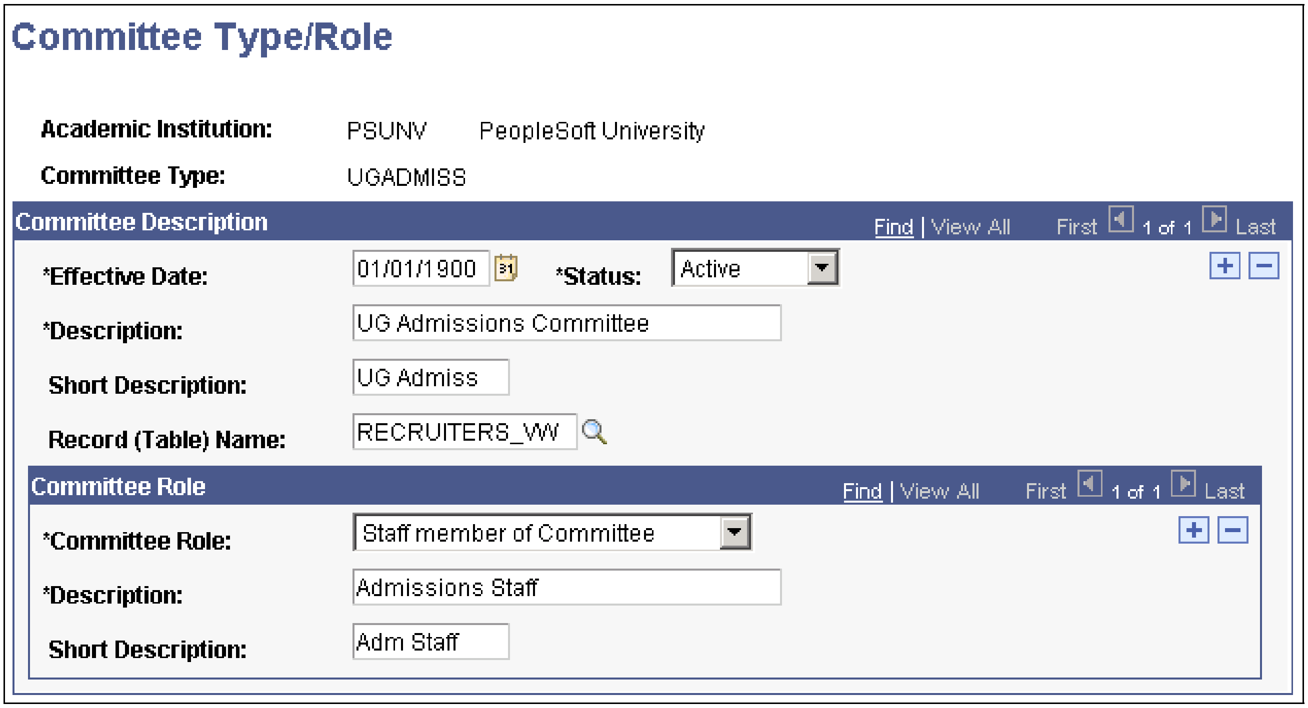
This section discusses how to define a committee type and assign member roles.

Page Used to Set Up Types and Roles

Page Name	***Definition Name***	***Navigation***	***Usage***
Committee Type/Role	COMMITTEE_TABLE	• Set Up SACR, Common Definitions, Committees, Committee Table Types/Roles • Campus Community, Committees, Committee Type/Role	Define a committee type and assign member roles.

Defining a Committee Type and Assigning Member Roles

Access the Committee Type/Role page (Set Up SACR, Common Definitions, Committees, Committee Table Types/Roles).



Committee Type/Role page

Committee Description

Record (Table) Name

Enter the name of the record that contains the types of individuals to make available for assignment to this committee. The selected record provides the prompt list of possible members on the Committee page.

For example, if you create an Undergraduate Interviews committee, and you select the RECRUITERS_VW, each time that you create a committee of the Undergraduate Interviews type, you are prompted to select members from the list of recruiters in your system.

Committee Role

Committee Role

Select the role (for example, chair, co-chair, member, student member, and so on) that should always be part of this committee type. You can add as many roles as necessary.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Chapter 26

Setting Up Campus Event Planning

This chapter provides an overview of campus events and discusses how to:

- Define campus events.
- Create an event template.

Note. Do not confuse the events described in this chapter with 3C engine events. One attends the events described here. 3C engine events are occurrences associated with data in your system.

Understanding Campus Events

You must define the items that you want to make available for events.

To define events, you:

- Define event types.
- Define event resource codes.
- Define event staff codes.

An event consists of one or more meetings, each of which has its own resources and staff. You can create templates for recurring or similar events by defining the meetings typically required for that type of event. You can then use or modify the template for recurring or similar events that require similar meetings, resources, and staff. Event templates are optional; however, they can be useful guidelines that save time.

Note. You can create only one template per event type.

To create an event template, do the following:

1. Define the meetings for the event type.
2. Assign the resources for each meeting.
3. Assign the type of staff for each meeting.

Defining Campus Events

To define campus events, use the following components: Event Type Table component (EVENT_TYPE_TABLE), Resource Code Table component (RESOURCE_CD_TABLE), and Staff Code Table component (STAFF_CODE_TABLE).

This section discusses how to:

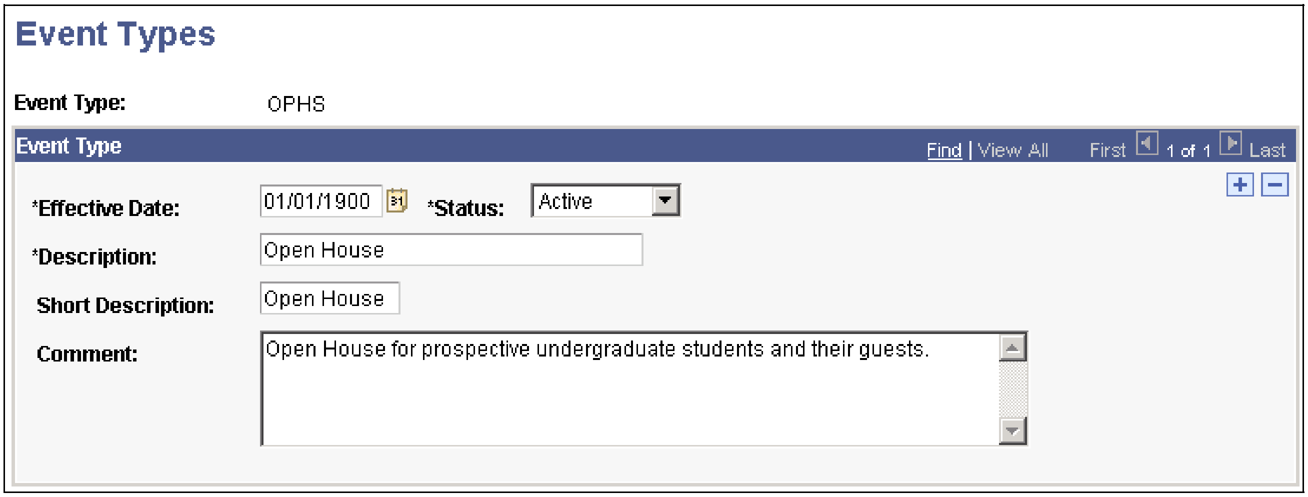
- Define event types.
- Define event resource codes.
- Define event staff codes.

Pages Used to Define Campus Events

Page Name	***Definition Name***	***Navigation***	***Usage***
Event Types	EVENT_TYPE_TABLE	Campus Community, Campus Event Planning, Set Up Events, Event Type Table	Define the general types of events.
Resource Codes	RESOURCE_CD_TABLE	Campus Community, Campus Event Planning, Set Up Events, Resource Code Table	Review or create codes for the resources to make available for events, such as tables, chairs, brochures, and banners.
Staff Codes	STAFF_CODE_TABLE	Campus Community, Campus Event Planning, Set Up Events, Staff Code Table	Identify and set up the types of staff for events, such as speakers, admissions counselors, tour guides, cooks, and servers.

Defining Event Types

Access the Event Types page (Campus Community, Campus Event Planning, Set Up Events, Event Type Table).

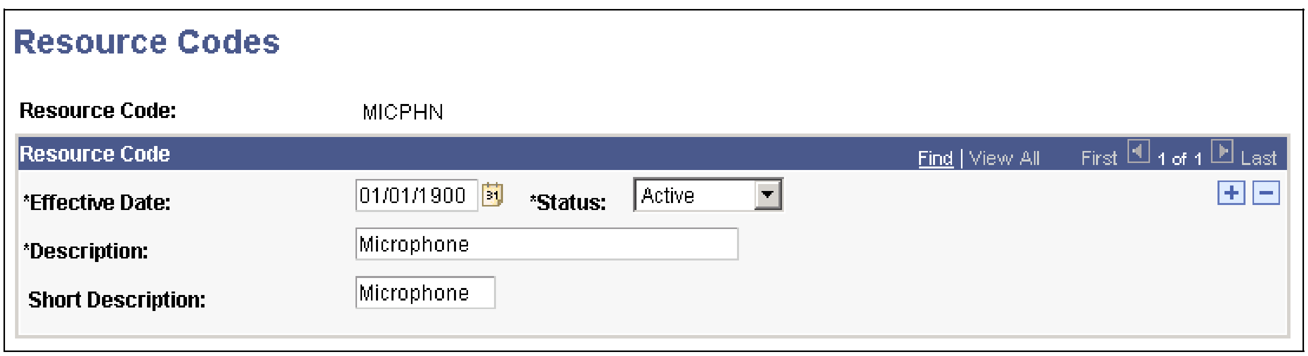


Event Types page

Comment Enter comments to further identify or describe this event type.

Defining Event Resource Codes

Access the Resource Codes page (Campus Community, Campus Event Planning, Set Up Events, Resource Code Table).

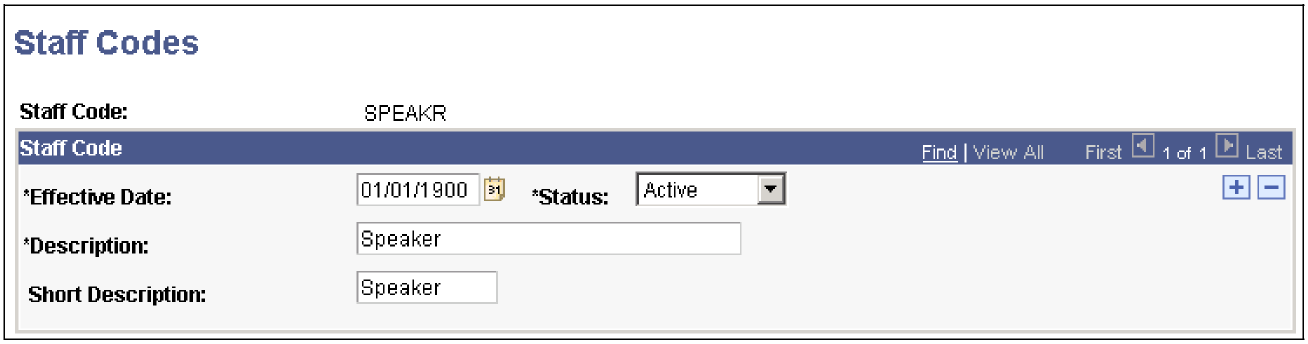


Resource Codes page

Enter information to describe the resource code to create.

Defining Event Staff Codes

Access the Staff Codes page (Campus Community, Campus Event Planning, Set Up Events, Staff Code Table).



Staff Codes page

Enter information to describe the staff code.

Creating an Event Template

To create an event template, use the Event Template component (CAMPUS_EVENT_TMPL).

This section discusses how to:

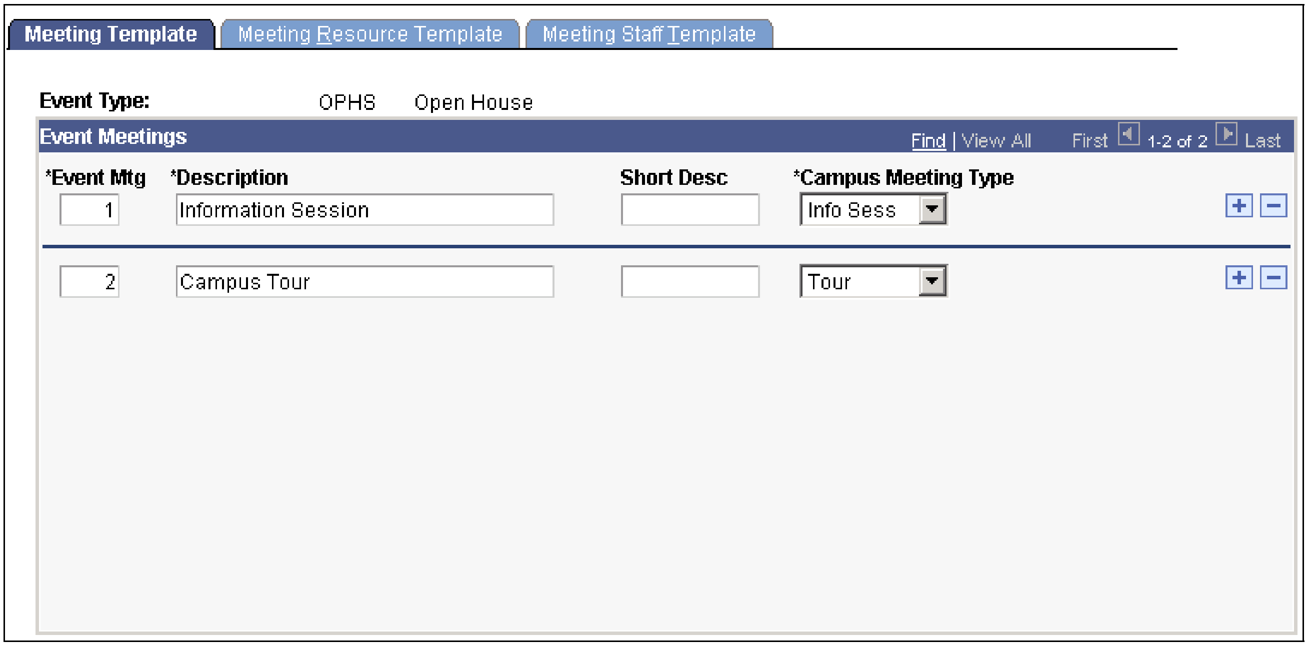
- Create an event meeting template.
- Assign the meeting resources.
- Assign the type of meeting staff.

Pages Used to Create an Event Template

Page Name	***Definition Name***	***Navigation***	***Usage***
Meeting Template	MTG_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Template	Identify meetings that comprise that event type.
Meeting Resource Template	MTG_RSRCE_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Resource Template	Assign resources that are required for each meeting in the event.
Meeting Staff Template	MTG_STAFF_TMPL	Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Staff Template	Designate the type of staff for each meeting in the event.

Creating an Event Meeting Template

Access the Meeting Template page (Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Template).



Meeting Template page

Event Meetings

Event Meeting

The system enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.

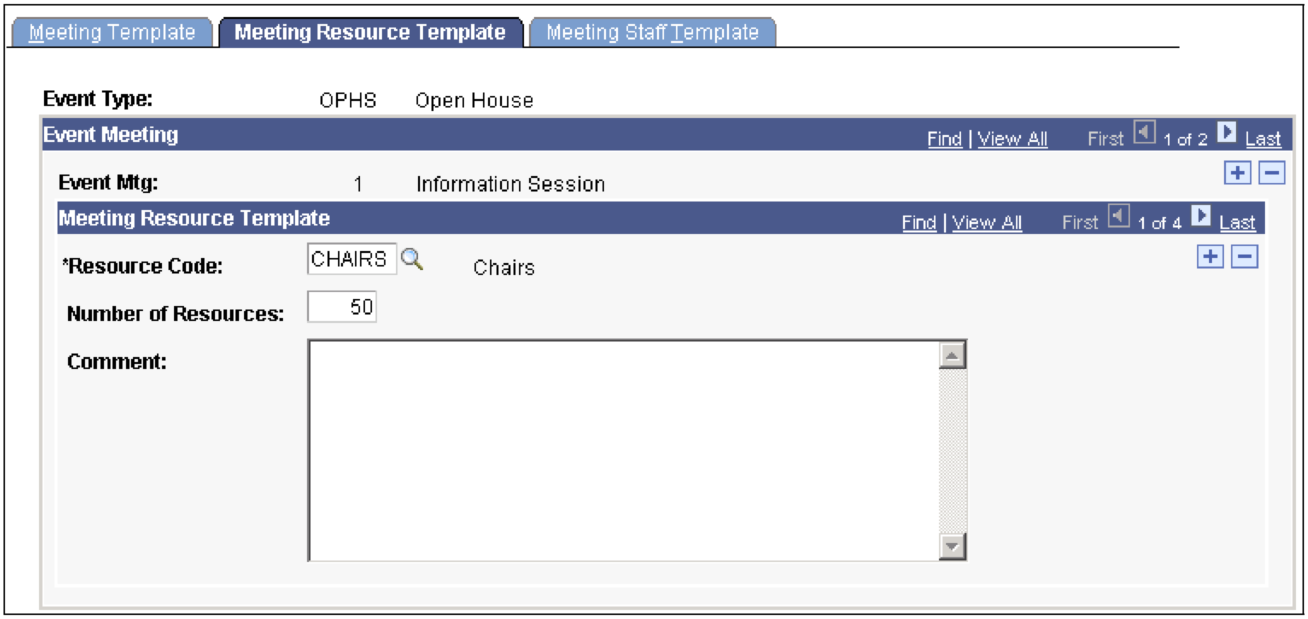
Campus Meeting Type

Select the meeting type that best describes this meeting.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Assigning the Meeting Resources

Access the Meeting Resource Template page (Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Resource Template).



Meeting Resource Template page

Meeting Resource Template

Resource Code Enter the type of resource that is required for this meeting.

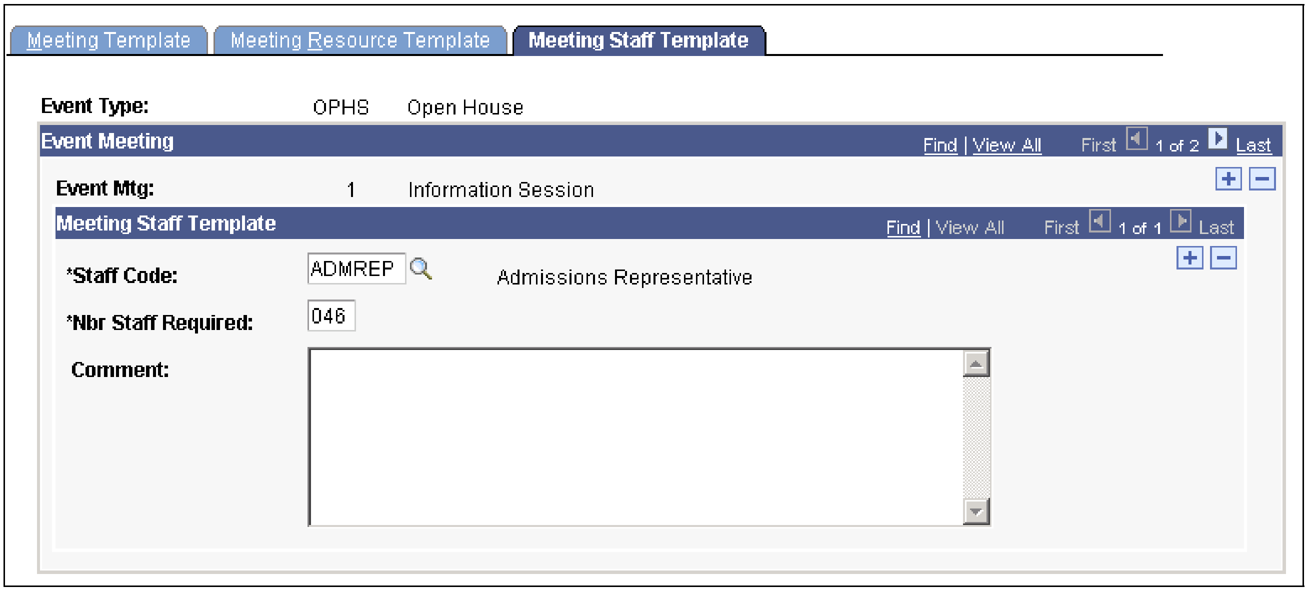
Available resource codes are from the Resource Codes page.

Number of Resources Enter the number or quantity of the resource required for this meeting.

Comments Enter comments to further identify or describe this resource.

Assigning the Type of Meeting Staff

Access the Meeting Staff Template page (Campus Community, Campus Event Planning, Set Up Events, Event Template, Meeting Staff Template).



Meeting Staff Template page

Meeting Staff Template

Staff Code

Enter the type of staff required for the meeting.

Available staff codes are from the Staff Codes page.

Number of Staff

Enter the total number of this type of staff required for the meeting

Comment

Enter comments to further describe or identify the staff required for the meeting.

Chapter 27

Managing System IDs

This chapter provides an overview of ID management and discusses how to:

- Create system IDs.
- Delete individual IDs.
- Change individual IDs.
- Delete organization IDs.
- Change an external organization ID.
- Update ID types.

Understanding ID Management

Unique IDs are vital to PeopleSoft Campus Solutions. When you add an individual or organization, the system creates a record and assigns the next available unique ID. The unique ID remains associated with that individual or organization unless or until you change or delete it.

When you want to add, update, or delete data about that individual or organization, use the unique ID to narrow your search and save time accessing the record.

To prevent arbitrary or accidental deletion of IDs, assign priority control data. Priority control data prevents users from deleting any ID that contains that data without first evaluating the data. Priority control data also prevents users from having to ask the system administrator or other individuals with the appropriate level of system security to delete the data.

Use the PeopleSoft Process Scheduler to delete or change individual IDs. You can select one ID or several IDs at the same time. When you run the process, the system creates an ID Change/Delete Process Log for each ID, showing how many rows were deleted for that individual and listing the records and fields that it updated. The log also indicates the administrative User ID that either deleted or changed an individual ID.

Warning! When you delete an ID, the system deletes not only the ID number, but all key data that is associated with that ID throughout the system. This loss of data could affect other departments. If the ID contains priority data, coordinate the need to delete it with other departments before deleting the priority data and the ID.

You can change system-generated IDs, but you must change and manage them manually. For example, you might want to change the system-generated IDs of 0000012, 0000035, and 0000062 to the IDs of PRES01, PRES02, and PRES03 to group those specific individuals within a list that only the president of the institution should manage. When you change them, the original system-generated IDs drop from the list of numbered IDs and appear instead as in a group of initial alpha character IDs. That is, the numbered ID list shows 0000033, 0000034, 0000036, 0000037, but the ID of 0000035 that you changed is not listed. That individual is now PRES02 in the list of IDs that are PRES01, PRES02, and PRES03.

Warning! Changes that you make to an ID affect the ID throughout the system, including other departments. Coordinate the need to change the ID with other departments before making the change.

You can also determine the last ID assigned, and determine or adjust the maximum length of system-generated IDs using the installation pages.

Creating System IDs

When you add an individual or organization to your database, the system creates a record and assigns the next available unique ID.

Deleting Individual IDs

This section discusses how to delete individual IDs.

Prerequisites

Identify priority control data to prevent the unwanted deletion of individual and organization IDs.

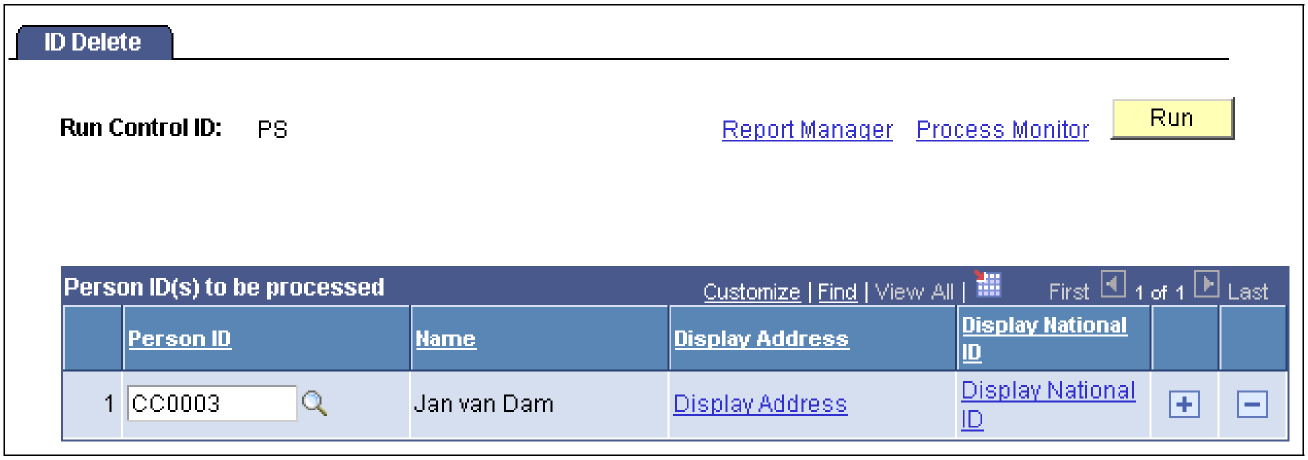
Pages Used to Delete Individual IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
ID Delete	RUNCTL_ID_CHANGE	• Set Up SACR, System Administration, Database Processing ID Delete • Campus Community, Personal Information, ID Management, ID Delete	Select individual IDs to delete.
Display Address	ADDRSS_DISPLAY_SEC	Click the Display Address link on the ID Delete page.	Review an individual's address to confirm that the ID is the correct one to delete.

Page Name	Definition Name	Navigation	Usage
Display National ID	NID_DISPLAY_SEC	Click the Display National ID link on the ID Delete page.	Review an individual's national ID to confirm that the ID is the correct one to delete.

Selecting Individual IDs to Delete

Access the ID Delete page (Set Up SACR, System Administration, Database Processing ID Delete).



ID Delete page

Enter information and then run the Change/Delete Person ID process.

Note. This page is also used in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce*,"Updating Person and Job Information," Changing and Deleting IDs

Person ID(s) to be processed

Person ID and **Name** — Enter the ID that you want to delete. The system displays the name of the person with that ID.

Display Address — Click this link to access the page on which you can review address data to further determine if this is the correct ID to delete.

Display National ID — Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to delete.

After running the Change/Delete Person ID process, you can review the updated records for the specific individual on the ID Change/Delete Process Log.

Changing Individual IDs

This section discusses how to:

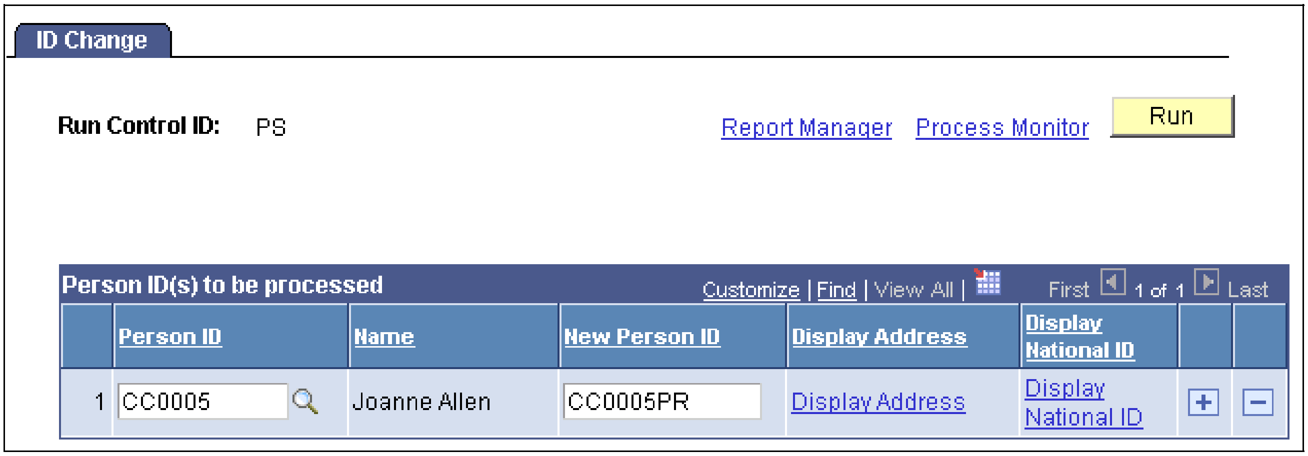
- Change an individual ID.
- Review changed or deleted individual ID records.

Page Used to Change Individual IDs

Page Name	***Definition Name***	***Navigation***	***Usage***
ID Change	RUNCTL_ID_CHANGE	• Set Up SACR, System Administration, Database Processing, ID Change • Campus Community, Personal Information, ID Management, ID Change	Change an individual ID.
ID Change/Delete Process Log	HR_PER502_LOG	• Set Up SACR, System Administration, Database Processing, ID Change/Delete Process Log • Campus Community, Personal Information, ID Management, ID Change/Delete Process Log	Review an individual's national ID to confirm that the ID is the correct one to delete.

Changing an Individual ID

Access the ID Change page (Set Up SACR, System Administration, Database Processing, ID Change).



ID Change page

Enter information to change one or more individual IDs, and then use the PeopleSoft Process Scheduler to run the Change/Delete Person ID process. When you run the process, the system changes the IDs that you list here. You can review the records updated for the individuals on the ID Change/Delete Process Log.

Note. This page is also used in PeopleSoft HRMS.

See *PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce*, "Updating Person and Job Information," Changing and Deleting IDs

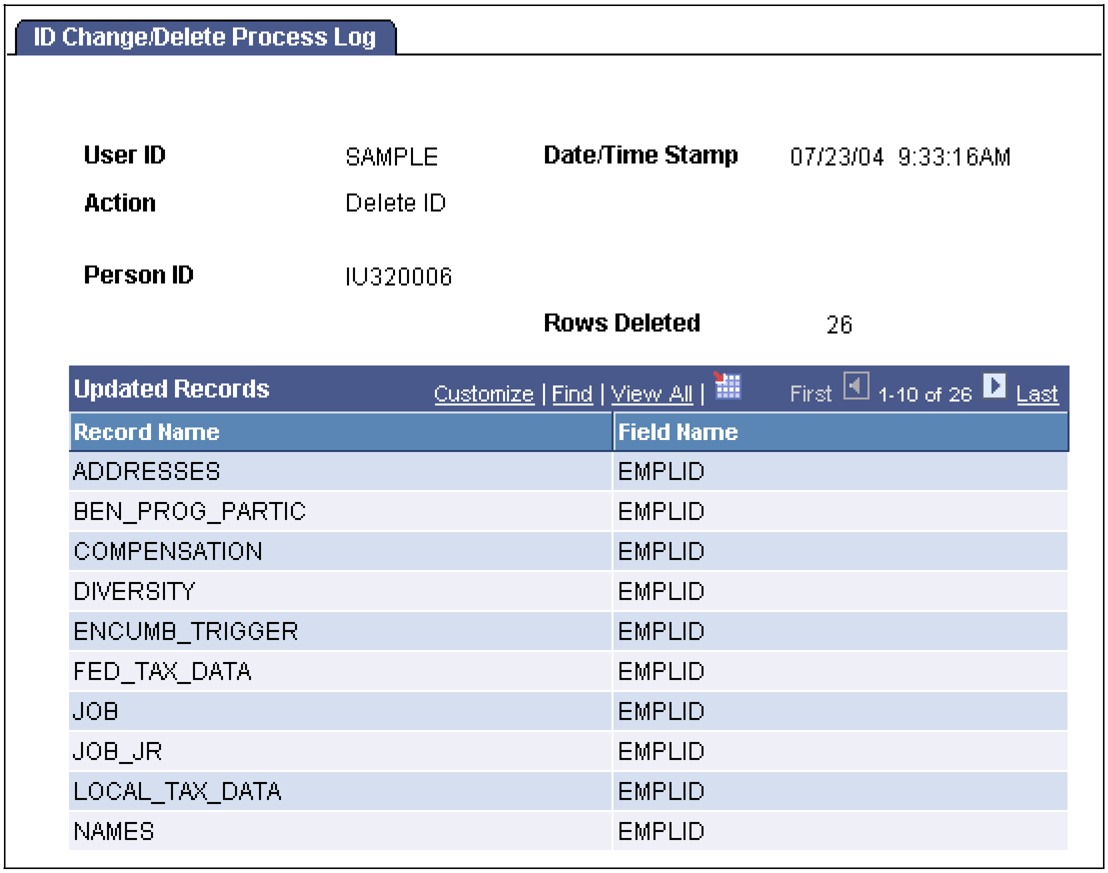
New Person ID Enter the new ID to assign to this individual; the new ID replaces the individual's existing ID.

Display Address Click this link to access the Display Address page, on which you can review the individual's address data to further determine if this is the correct ID to change.

Display National ID Click this link to access the Display National ID page, on which you can review the individual's national ID numbers to further determine if this is the correct ID to change.

Reviewing Changed or Deleted Individual ID Records

Access the ID Change/Delete Process Log page (Set Up SACR, System Administration, Database Processing, ID Change/Delete Process Log).



ID Change/Delete Process Log

User ID	SAMPLE	**Date/Time Stamp**	07/23/04 9:33:16AM
Action	Delete ID		
Person ID	IU320006		
		Rows Deleted	26

Updated Records Customize | Find | View All | First 1-10 of 26 Last

Record Name	Field Name
ADDRESSES	EMPLID
BEN_PROG_PARTIC	EMPLID
COMPENSATION	EMPLID
DIVERSITY	EMPLID
ENCUMB_TRIGGER	EMPLID
FED_TAX_DATA	EMPLID
JOB	EMPLID
JOB_JR	EMPLID
LOCAL_TAX_DATA	EMPLID
NAMES	EMPLID

ID Change/Delete Process Log page

Information on this page is display-only. You cannot enter or edit data here. The information displayed lists changes made as the result of the Change/Delete Person ID process, which is run from the ID Delete or ID Change pages.

Deleting Organization IDs

This section provides an overview of organization ID deletion and discusses how to select the organization ID to delete.

Understanding Organization ID Deletion

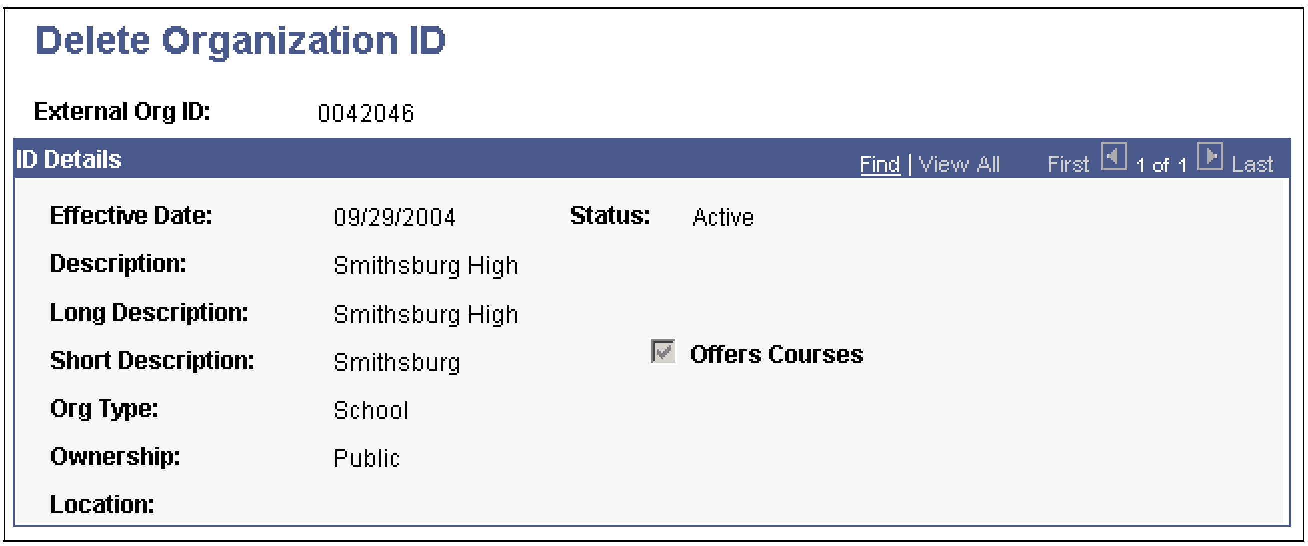
Within PeopleSoft Campus Solutions, when you try to delete an organization ID that contains data in any of the priority records that are specified on the ID Delete Control page, the system does not allow the deletion. Instead, it displays a message that lists the specific records and key fields that contain priority data for the ID. To delete the ID, you or your system administrator must first remove the associated priority data.

Page Used to Delete Organization IDs

Page Name	*Definition Name*	*Navigation*	*Usage*
Delete Organization ID	ORG_ID_DELETE	Campus Community, Organization, Delete Organization ID	Select an organization ID to delete.
Change Organization ID	ORG_ID_CHANGE	Campus Community, Organization, Change Organization ID	Select an organization ID to change.

Selecting the Organization ID to Delete

Access the Delete Organization ID page (Campus Community, Organization, Delete Organization ID).



Delete Organization ID page

Description, Org Type (organization type), **Ownership,** and **Location**

Review information here to verify that this is the correct ID to delete. When you save the page, the organization ID will be deleted.

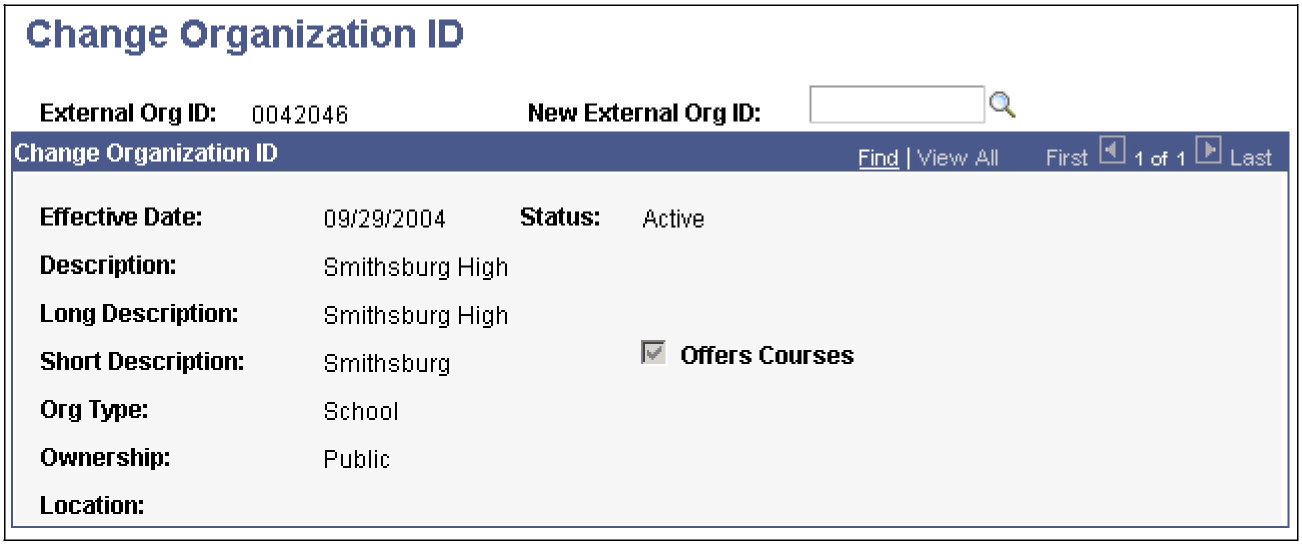
Note. Only one organization ID can be deleted at a time.

Changing an External Organization ID

This section discusses changing an organization ID.

Selecting the Organization ID to Change

Access the Change Organization ID page (Campus Community, Organization, Change Organization ID).



Change Organization ID page

New External Org ID (new external organization ID)	Enter the external organization ID to assign. You can enter a nonexisting ID or choose from the list of existing IDs.

Updating ID Types

This section provides an overview of ID type updates and discusses how to run the Update ID Type process.

Understanding ID Type Updates

By storing each ID type, whether it be for a person or an organization, in a single table (ID_TYPE_TBL record) and associating an indicator flag value to each, you can use individual or organization IDs as a single ID field in applications that are common to both individuals and organizations.

For example, when using the 3C features, you can add a communication to a person by adding a communication to a person ID or you can add a communication to an organization by adding a communication to an organization ID. The Communication feature is the same for both types of IDs because they can be combined inside a common ID (COMMON_ID). Running the Update ID Type process inserts the person ID and the organization ID into the ID_TYPE_TBL and assigns to each a type (either person or organization) by which to differentiate them.

Page Used to Update ID Types

Page Name	*Definition Name*	*Navigation*	*Usage*
Update ID Type	RUNCTL_CCIDTYPE	• Set Up SACR, System Administration, Database Processing, Update ID Type • Campus Community, Personal Information, ID Management, Update ID Type	Run the Update ID Type process to associate the correct ID type—either person or organization—with each ID in your system.

Running the Update ID Type Process

Access the Update ID Type run control page (Set Up SACR, System Administration, Database Processing, Update ID Type) to run the Update ID Type process (CCIDTYPE SQR). Use PeopleSoft Process Scheduler to run the Update ID Type process.

Chapter 28

Setting Up List of Values

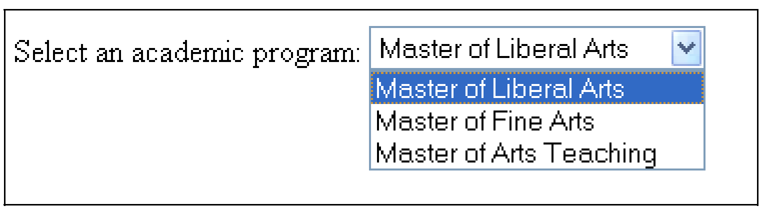
This chapter provides an overview of the List of Values web services operation and discusses the List of Values setup.

Understanding Get List of Values Web Service Operation

You can develop an external user interface (UI) outside of your PeopleSoft Campus Solutions system. For example, a PeopleTools-developed UI that is directly connected to the PeopleSoft database for entering personal data is *internal.* A web page used by the student, which is not directly connected to the PeopleSoft database, is *external.*

This external UI may present list or prompt fields to the users. These fields only accept input from a list of values. The list of values could be prompt values that you set up in Campus Solutions or translate values that the system delivers. For example, you define Communication Category field values using the Communication Categories page (Set Up SACR, Common Definitions, Communications, Communication Category Table). On the other hand, a Campus Solutions page has a Direction field. This field has delivered translate values, such as *Outgoing Communication* and *Incoming Communication.*

The following is an example of a field with a list of values.



A List field

The Get List of Values service operation (SCC_GET_LOV) allows an external UI to request a list of prompt or translate values for a field name configured inside the PeopleSoft Campus Solutions database.

The LOV request message (SCC_LOV_REQ message) accepts the following input parameters:

- Record Name (required).
- Field Name (required).
- LOV Context (optional – defined on the List of Values Setup component).

The list of values retrieved by the service is used to populate drop-down list boxes or prompt fields in an external UI. Also, the external UI logic can use this retrieved list of values to validate a value that a user enters in a field of the external UI.

When the Get List of Values service operation is called, the external UI nominates the field name and its record for which the service should return the list of values. The external UI can request one or more lists of values in a single Get List of Values call. For example, the external UI could request lists of values for multiple field names in one request when it initializes, as long as the field names do not have dependencies on other fields known as key fields. Doing so is a recommended procedure and will save processing time. Subsequently, the external UI can call the service operation whenever necessary.

The external UI does not have to authenticate a user to use this service. That is, a User ID is not required when an external UI calls this service. Therefore, you can use the Get List of Values service operation to populate a list of values on a *pre-Login* page. For example, a pre-login page may ask applicants to select an academic career before they can sign into the external UI.

When the request message contains a LOV Context, the service returns the list of values based on the settings in the List of Values Setup page for the record name, field name, and LOV Context combination.

When the external UI does not include the LOV Context inside the request message, the service returns the list of values based on the settings in the List of Values Setup page for the record name and field name where LOV Context is set to *Default.*

If you have not set up a *Default* LOV Context for the record name and field name, the service returns the list of values based on the prompt table defined for the field name of the record or the translate values if the field passed is a translate field. The service will have no output if the prompt table does not exist or is empty for the record-field name combination.

Warning! Configuring the List of Values Setup page or using the Get List of Values service operation is a technical task and should only be performed by developers with strong Integration Broker skills and good understanding of the record structure contained inside the PeopleSoft Campus Solutions application.

How the Get List of Values service operation returns list of values

There are two ways to return list of values to the external UI:

1. *Default* way: The service uses the record definition or the field properties (for translate fields) defined in Application Designer.

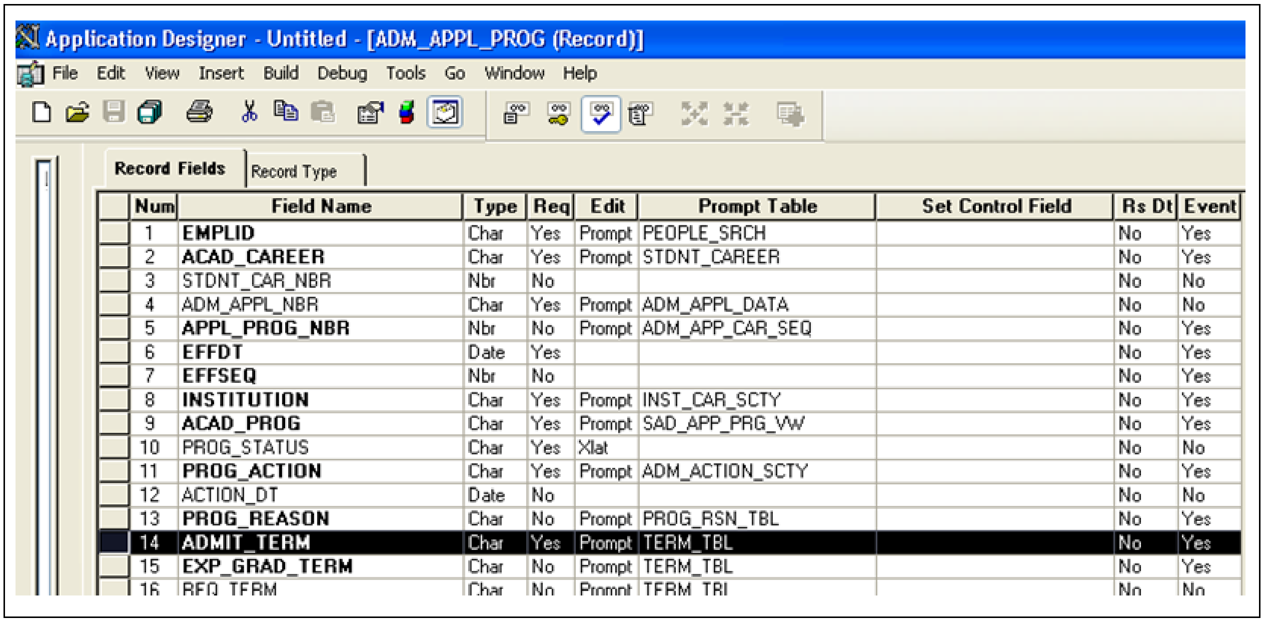
2. *Optional* way: The service uses the List of Values Setup component

1. Default way: The system can use the default way for both *prompt* and *translate* fields.

The following describes the default way for a prompt field:

- For a prompt field, the list of values that the service returns is determined by the prompt table associated with the field name from the record definition in Application Designer.

  For example, in the following graphic, notice that the ADMIT_TERM field name from the ADM_APPL_PROG record is associated with a prompt table TERM_TBL. Therefore, when the ADMIT_TERM field and ADM_APPL_PROG record are passed inside the LOV request message (and no LOV Context is passed) the service retrieves the admit terms list of values from TERM_TBL.

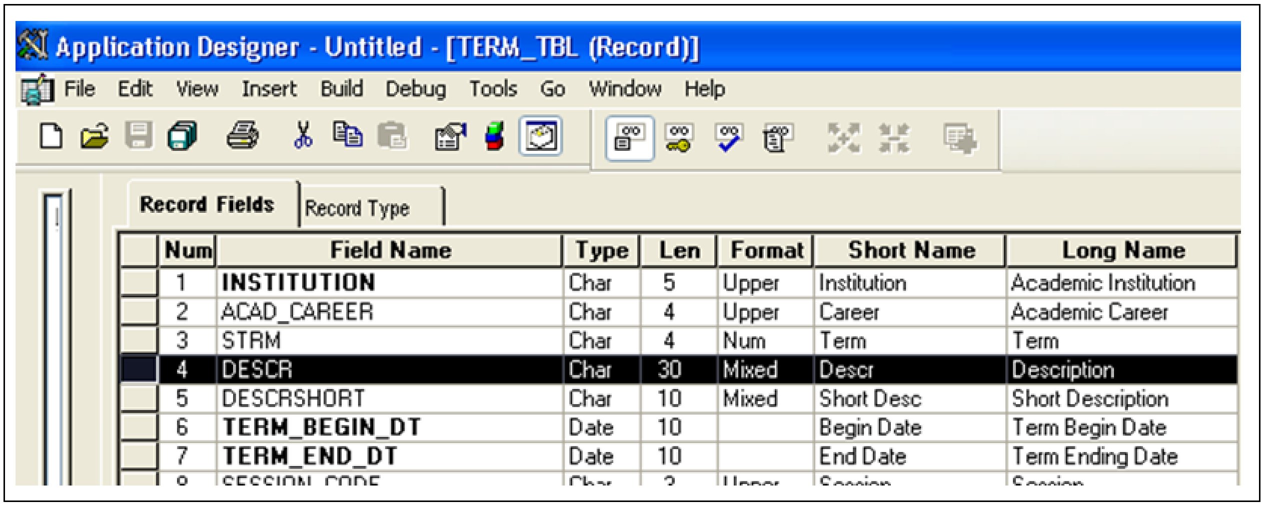


Num	Field Name	Type	Req	Edit	Prompt Table	Set Control Field	Rs Dt	Event
1	EMPLID	Char	Yes	Prompt	PEOPLE_SRCH		No	Yes
2	ACAD_CAREER	Char	Yes	Prompt	STDNT_CAREER		No	Yes
3	STDNT_CAR_NBR	Nbr	No				No	No
4	ADM_APPL_NBR	Char	Yes	Prompt	ADM_APPL_DATA		No	No
5	APPL_PROG_NBR	Nbr	No	Prompt	ADM_APP_CAR_SEQ		No	Yes
6	EFFDT	Date	Yes				No	Yes
7	EFFSEQ	Nbr	No				No	Yes
8	INSTITUTION	Char	Yes	Prompt	INST_CAR_SCTY		No	Yes
9	ACAD_PROG	Char	Yes	Prompt	SAD_APP_PRG_VW		No	Yes
10	PROG_STATUS	Char	Yes	Xlat			No	No
11	PROG_ACTION	Char	Yes	Prompt	ADM_ACTION_SCTY		No	Yes
12	ACTION_DT	Date	No				No	No
13	PROG_REASON	Char	No	Prompt	PROG_RSN_TBL		No	Yes
14	ADMIT_TERM	Char	Yes	Prompt	TERM_TBL		No	Yes
15	EXP_GRAD_TERM	Char	No	Prompt	TERM_TBL		No	Yes
16	REQ_TERM	Char	No	Prompt	TERM_TBL		No	No

Application Designer showing the prompt table associated with a field

- To determine which description field to use to return the list of values, the default logic evaluates the identified prompt table (TERM_TBL in our example) and checks if it includes the following fields (respecting the order given): DESCR, DESCRSHORT, DESCR30, DESCR100.

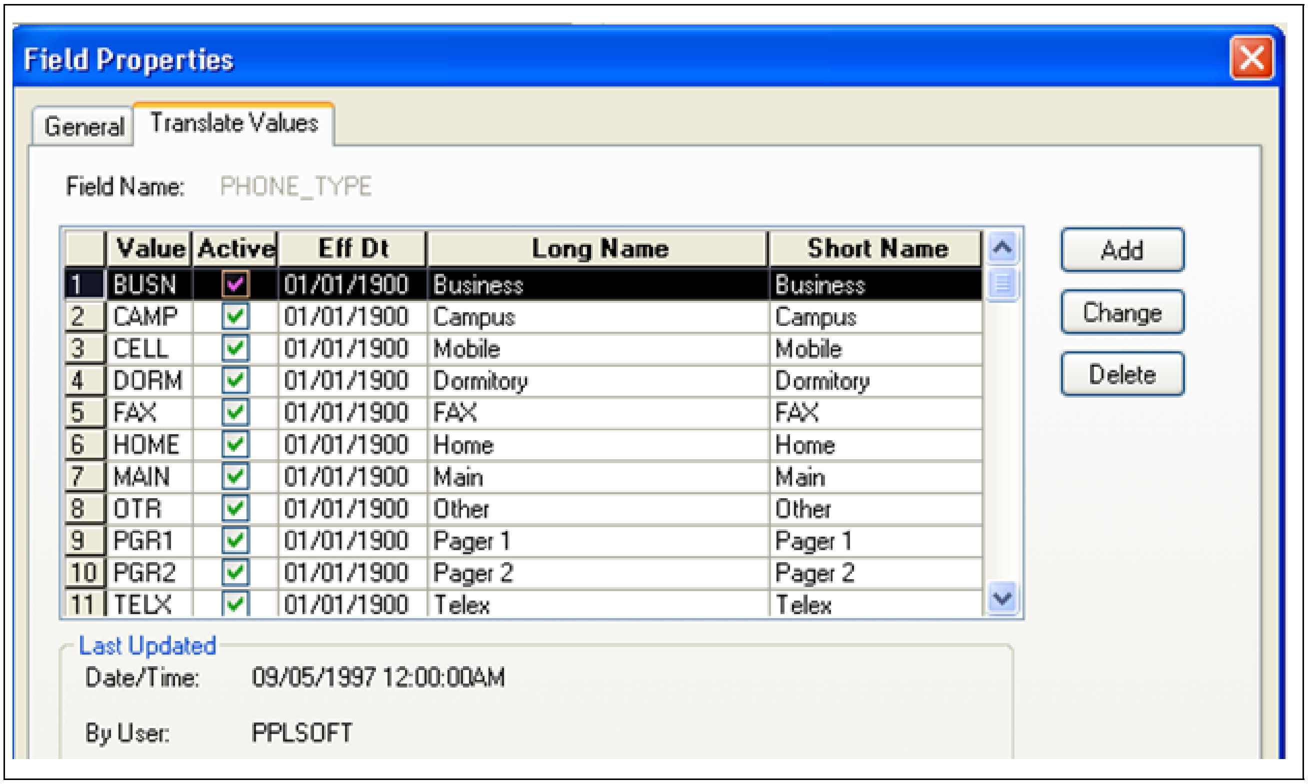
  The first of these fields that the service encounters is the one used to return the list of values. If none of these four fields exist, the logic uses the first non-key field marked as a list box item. To continue with our example, for the prompt table TERM_TBL, the DESCR field is the first field encountered from the list mentioned above, and it is therefore the field used to return the list of values.



Application Designer showing the description fields for a record

The following describes the default way for a translate field:

For a translate field, the service retrieves the list of values from the field properties defined for the field name and the record. The external UI lets the service know for which field name and record the service should retrieve the values. For instance, if the external UI displays the Phone Type list field, the UI can include inside the request message the record PERSONAL_PHONE and the field name PHONE_TYPE (and LOV Context is left blank). On receiving this request message, the service includes the translate values defined for the PHONE_TYPE field name inside the response message. The service uses the Long Name fields as the values in the response message.



Application Designer showing the field properties for a translate field

2. Optional way: The system can use the optional way for both *prompt* and *translate* fields. Use the optional way if you do not want to use the default way for a specific list of values to retrieve.

For a prompt field: if you want the service to retrieve list of values from a different table (or a view that contains logic to restrict the returned values), you can use the List of Values Setup component to select a different table (or view), select a different field description or to exclude values you do not want to display inside the external UI.

For a translate field: you can use the List of Value Setup component to make the service retrieve the list of values using the Short Name field or to exclude some values that you do not want to display on the external UI.

See "Setting Up List of Values" section in this chapter for more information about the List of Values Setup component.

Logic to determine which way the Get List of Values service operation should use to return the list of values

To determine whether the *default* way or the *optional* way should be used, the Get List of Values web service operation first evaluates whether the optional way has been set up for the record and the field names included inside the LOV request message, else it uses the default way. The following describes this logic:

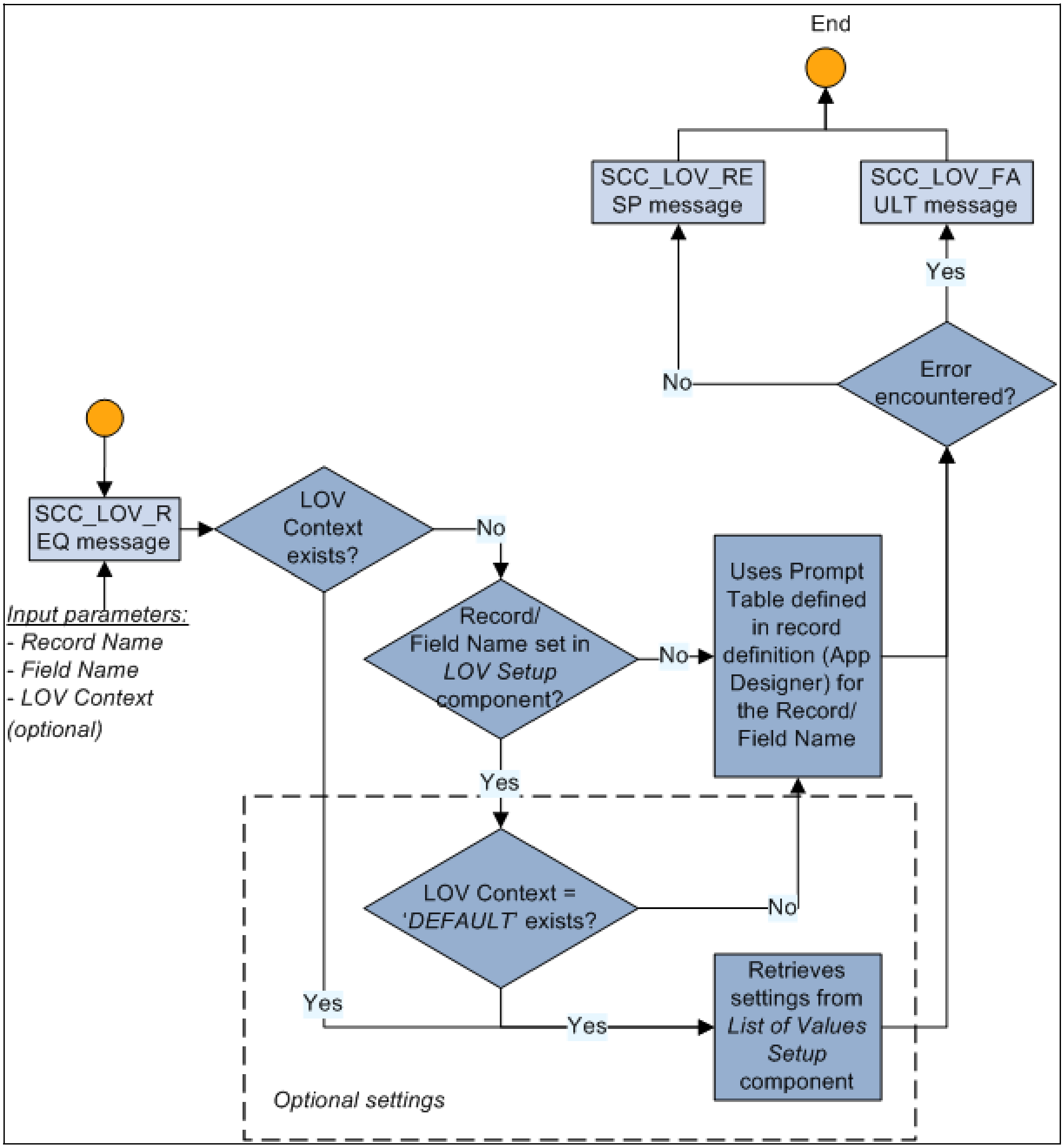
1. The logic determines whether the list of values configuration exists in the List of Values Setup component for the record name, field name, and optionally the LOV Context combination that exists inside the LOV request message.

2. If a LOV Context exists inside the LOV request message, the logic retrieves the list of values and the proper description according to the configuration for the record name, field name, and LOV Context combination in the List of Values Setup component.

3. If a LOV Context does not exist inside the LOV request message, the logic still looks at the List of Values Setup component for the record name and field name configuration, but this time where the LOV Context is set as DEFAULT.

   If a default exists for the record name and the field name in the List of Values Setup component, the logic returns the LOV response message (SCC_LOV_RESP) according to the record name, field name, and DEFAULT LOV Context.

4. If the DEFAULT LOV Context does not exist, or if the List of Values Setup component is not defined for the record name and field name included inside the LOV request message, the logic uses the record definition or the field properties (in the case of a translate fields) defined in Application Designer for the record name and field name mentioned in the LOV request message.



Get List of Values service operation logic

Note that the Get List of Values service operation returns an error message (SCC_LOV_FAULT) to the user interface in the following situations:

- The UI has not supplied the required record name and field name input parameters.
- The UI has not supplied the required key field name input parameters.
- The UI has supplied an invalid record name or field name.
- The UI has supplied a record name or field name which has its prompt table defined as %Edittable (dynamic prompt table).

Note. The external UI, which you develop, decides how to handle this error message.

Note. Using the List of Values Setup component is optional. Setting up list of values is useful only if the external UI wants to display lists of values that are defined inside your PeopleSoft Campus Solutions system and you want to alter the default way in which the operation picks up the list of values for a field. If you want the external UI to display lists of values that are defined inside the PeopleSoft Campus Solutions system, and you want to use the default way in which the operation picks up the list of values, you need not use the List of Values Setup page. If you are creating a UI that resides inside your PeopleSoft Campus Solutions system, you need not use this setup component. Instead, use the regular PeopleTools logic to display the translate values and the prompt values. Also, note that only the Get List of Values service operation can use this setup

Setting Up List of Values

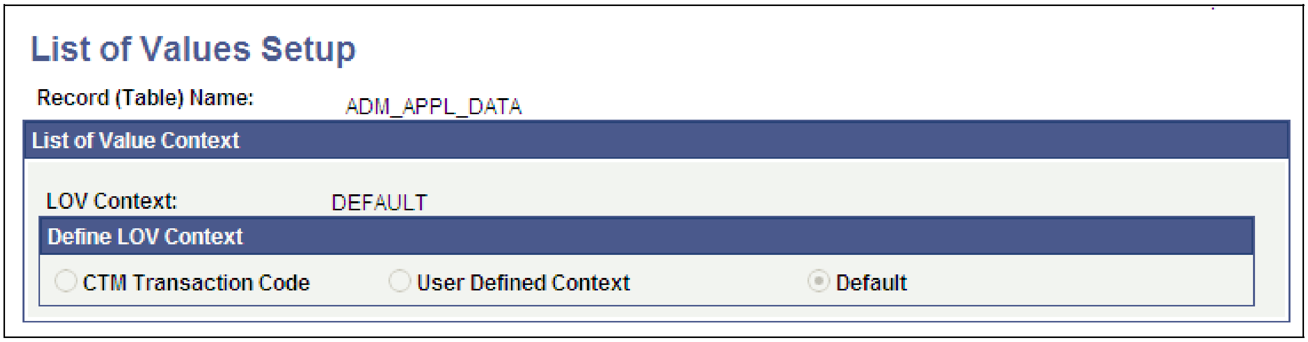
This section discusses how to set up list of values.

Page Used to Set Up List of Values

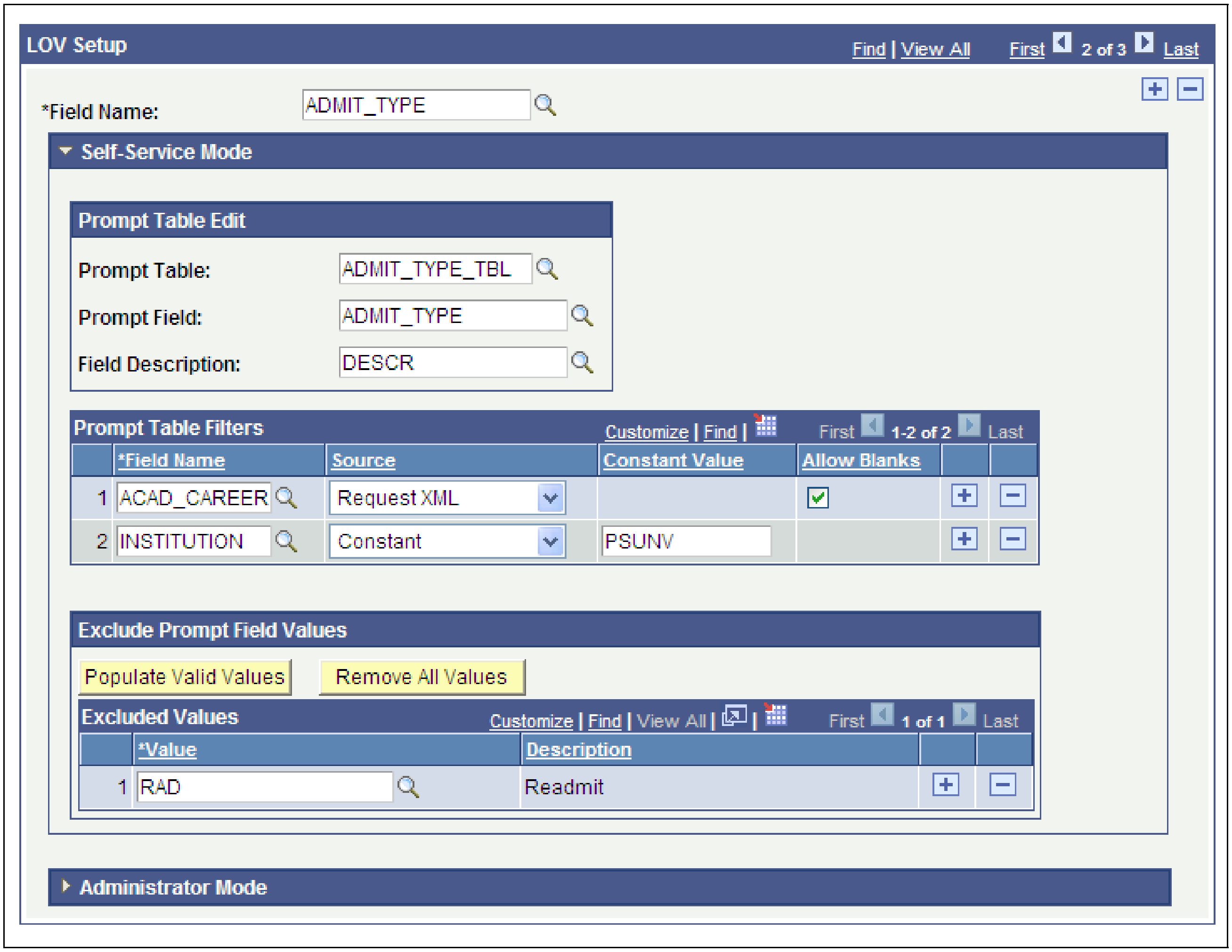
Page Name	***Definition Name***	***Navigation***	***Usage***
List of Values Setup	SCC_SL_LOV	Set Up SACR, System Administration, Utilities, List of Values, List of Values Set Up SACR, System Administration, Utilities, Constituent Transaction Mgmt, List of Values Set Up SACR, Product Related, Recruiting and Admissions, Application Configuration, List of Values	Define how the Get LOV service operation should return the list of values for a field. The system uses this setup when the external user interface calls the Get List of Values service operation.

Setting Up List of Values

Access the List of Values Setup page (Set Up SACR, System Administration, Utilities, List of Values, List of Values).



List of Values Setup page (1 of 2)



List of Values Setup page (2 of 2)

You configure list of values for a specific record name and field name. Because multiple external UIs can use the same record-field name combination and a single UI can use the same record-field name combination differently, you need to identify in which context the setup should be used. You do that by defining a LOV Context. Here is an example of when you will use two different contexts for a record-field name combination. Suppose you want to create an external UI that prospect students will use to review information about the academic programs your institution offers. The Academic Program list or prompt field in the UI should display the list of programs offered for all academic careers. On the other hand, you want to create another external UI that allows an applicant to apply to a specific program for a specific career. In such a case, you want the Academic Program list or prompt field to display the list of programs for which you are ready to accept online applications for a particular career, such as undergraduate. In both UIs, you want to use the Academic Program field (that is, record name ADM_APPL_DATA and field name ACAD_PROG), but the UIs should display different list of values. To support this functionality, you may have two contexts for ADM_APPL_DATA record name and ACAD_PROG field name with different settings to exclude some values. The combination of LOV Context, record name and field name determines which setup to use, to return to the users the proper list of values for a Campus Solutions translate field or a prompt field.

You can also configure, using the same LOV Context, record name, and field name combination, different list of values settings depending on whether the external user interface is used by a self-service user (Self-Service Mode) or an administrative user (Administrator Mode). This is dictated by the external UI logic and the information is passed inside the LOV service operation (SCC_ADMIN_MODE element is included inside the LOV request message). Whether or not the external UI passes SCC_ADMIN_MODE parameter determines which LOV mode settings are used by the service. Setting the list of values differently for self-service users and administrators can be useful, for example, if you want to restrict the number of values returned to the self-service users or to show them the long descriptions. For your administrative users, it may be more appropriate to show them the short descriptions to enable them to select from a larger list of values.

See *PeopleSoft Campus Community Fundamentals 9.0 PeopleBook* ,Working with Constituent Transaction Management, "Using Self-Service and Administrator Modes for Online CTM Transactions" for more details on Administrator Mode.

Record (Table) Name	Indicates the record reference that you want to configure to determine how the list of values should be returned. You specify the record name when you access the List of Values Setup page in Add mode.

List of Value Context

You define a list of values set up for a combination of a record name and a field name.

Multiple external UIs can use the combination and you can have multiple lists of values setup records for a single record-field combination based on the UI logic. Due to this reason you can define in what context the list of values settings are applicable for the record-field combination.

Use the List of Value Context group box to define a context.

LOV Context

Required. Define the context in which the list of values settings for the record-field name combination will be used. This field is display-only and you can populate a value in this field only by selecting one of the options in the Define LOV Context group box.

You define a LOV Context when you create a list of values setup record on the List of Values Setup page. When you save the record, the LOV Context field becomes uneditable.

Note. While the LOV Context is required inside the List of Values Setup component, it is optional inside the LOV request message. When the request message does not contain a LOV Context, the LOV response message returns the list of values for the DEFAULT LOV Context setup, for the record-field combination. If DEFAULT is not set up for the record-field combination, the service returns the list of values based on the prompt table or the field properties (in the case of a translate field) defined for the record and field in the Application Designer.

Define LOV Context

Select an option to indicate which LOV Context the list of values service should use:

CTM Transaction Code

Select if this list of values setup is specific to a single Constituent Transaction Management (CTM) transaction.

By selecting this option, you name the LOV context the same as the transaction code.

When you select this option, the Transactions Code field becomes available.

Note. This option is editable only when you create a new list of values setup.

Transactions Code

Enter a transaction code that the system should name as the LOV context.

Note that the lookup for this field displays only the Active Transaction Code values (SCC_TRNSAC_DTLS.SCC_TRANSAC_CD).

User Defined Context

Select if this list of values setup is specific to a user-defined context. For instance, suppose multiple CTM Transaction Codes use the same UI. In such a case, the UI should select a single LOV context that applies to the multiple transaction codes.

In addition, you can select this option when the UI is used outside of CTM.

When you select this option, the User Defined Context text box field becomes available.

Note. This option is editable only when you create a new list of values setup.

User Defined Context (text box field)

Enter a name for the LOV Context.

Default

Select to set this list of values setup as the default.

Select this option when the list of values setup for the selected record name and field name is applicable to all of your external UIs in all circumstances.

A *default* LOV Context is also useful when no LOV Context is included inside the LOV request message (only a record-field combination is included). In such a case, the response message, if it exists, will return the list of values for the Default LOV Context, for the record-field combination.

Note. This option is editable only when you create a new list of values setup.

LOV Setup

Use this scroll area to define the list of value settings for a specific field (Field Name) in the record (Record (Table) Name). You can define list of values settings for multiple fields in a record.

Field Name

Enter the field whose list of values you want to modify.

A record may have multiple fields and therefore multiple rows may exist on the LOV Setup scroll area because:

- The transaction could be inserting data into multiple fields of this record, or
- One field is dependent on another field for its list of values.

  For example, the ADM_APPL_PROG record contains ACAD_PROG and ADMIT_TERM fields because the list of valid academic programs is dependent on an admit term. On an online application transaction, the user must first specify an admit term and then the academic program

If you enter a field name that has a user-defined list of values (that is, a prompt field), the system displays the Self-Service Mode and Administrator Mode collapsible sections. Examples of fields that have user-defined list of values include ACAD_CAREER and ADMIT_TYPE for the ADM_APPL_DATA record.

If you enter a field name that is set up with translate values in its properties, the system hides the Self-Service Mode and Administrator Mode collapsible sections and displays the Translate Usage group box. Example of a field that has translate values is HOUSING_INTEREST for the ADM_APPL_DATA record.

Self-Service Mode and Administrator Mode

These two collapsible sections appear only for a field name that has a user-defined list of values.

Use the Self-Service Mode collapsible section to control the list of values returned to the external UI accessed by self-service users.

Use the Administrator Mode collapsible section if you want to configure the list of returned values differently when an administrator uses the same record name and field name in the same context. Using the self-service or the administrator mode is dictated by the SCC_ADMIN_MODE logic you put in the external UI. If the external UI includes SCC_ADMIN_MODE in the request message, the service determines that it has to use the Administrator mode. Conversely, if the external UI does not include SCC_ADMIN_MODE in the request message, the service determines that it has to use the Self-Service mode.

In the collapsible sections, you can identify the criteria that the service should use to return the list of values. To define the criteria, you can:

1. Use the *Prompt Table Edit* group box to select the table (or the view) you want to prompt to retrieve the list of values.

   By default, the system populates the Prompt Table and the Prompt Field fields with the prompt table information defined in Application Designer for the record and the field name you selected. Using a view here can be useful if you want to add logic to restrict the list of values based on criteria of your choice.

2. Use the *Prompt Table Filters* grid to filter the values in the selected prompt table.

   To filter, you can set up a constant or force the values to come from the xml request. In the latter case, the value needs to come from the external UI (whether it is entered by a user or programmatically forced by the UI logic), For example, in the previous List of Values Setup page graphic example, the setup is asking the external UI to specify an academic career (ACAD_CAREER) to filter the admit types to return (ADMIT_TYPE field). The academic career value is either entered by the external UI user or programmatically defined by the UI logic.

3. Use the *Exclude Prompt Field Values* group box to indicate the values you want to exclude from the list of values returned to the self-service users or administrative users.

Note. When you use Administrator Mode, the academic structure security settings restrict the list of values that the service returns. Examples of academic structure security settings include: institution, career, program, and plan security. Therefore, in such cases, administrators can view only those values for which they are authorized to access, as defined in the List of Values Setup component and the academic structure security settings.

Prompt Table Edit

Prompt Table

Select the table from which you want the Get List of Values service operation to retrieve the values.

The system populates the Prompt Table field, by default, with the prompt table defined in Application Designer for the record name and field name. You can change this value to select a different prompt table to display the proper values. For example, you could create a view that uses an SQL to further restrict the values to return to the external UI.

Note. If selected prompt table is a secured table, the external UI users will need to have the proper security to access certain values. In Campus Solutions, granting security access to secured tables is often controlled by User ID under Set Up SACR, Security, Secure Student Administration, User ID. While administrators should always have a User ID, self-service users may not have a User ID. Because self-service users may not have a User ID, on the Self-Service Mode collapsible section, you may need to select a prompt table for which the system does not apply User ID security.

Warning! You cannot use a dynamic view or a derived record as a prompt table because they are not a reliable list of values source for the service operation.

Prompt Field

Select the column from which you want the service operation to retrieve the values.

The system populates this field, by default, with the field name defined in Application Designer for the record and field name. You can change this value to select a different field name to display the desired values.

Field Description

Indicate which description field you want the service to use to return the list of values. The choices are the fields contained inside the Prompt Table record you selected.

If you know that the external UI users are familiar with seeing the values' short description you could indicate to display the short descriptions, if it is present inside the prompt table. Displaying a list of short descriptions could be appropriate for administrators. But if you want the external UI to display the full descriptions for the values, you may want to indicate to display the long descriptions if it is present inside the prompt table. For example, administrators may be familiar with seeing the short descriptions for the Academic Career values, but a self-service user might find it more useful to see the long descriptions. In such a case, you would set up the value descriptions so that the administrator would see the short description, UGRD and the self service user would see the long description, *Undergraduate.*

Depending on the description field that you select, the LOV response message will return the list of values with the desired descriptions.

Warning! If you do not enter a description field, the Get LOV response message will return codes without descriptions.

Warning! While the Field Description prompt shows all the fields contained inside the selected prompt table, make sure you select a field that really stores a description. For instance the long description field is often called DESCR and the short description DESCRSHORT. Selecting a field not related to description will result in wrong behavior.

Prompt Table Filters

Use this grid to filter the list of values, based on data populated for certain fields.

On this grid, list the fields that the system will use to filter the list of values. The filtering will be performed based on how these fields are populated. The filtering data can be populated by the UI (when *Request XML* is selected) or by setting a constant (when *Constant* is selected). This is useful especially when key fields need to be populated prior to retrieving the list of values. To do so, you select the key fields that are contained inside the selected prompt table. The service will then need values for these key fields to return the appropriate list of values for the selected prompt field. For instance, if you set up list of values for the ADM_APPL_PROG record name and the ADMIT_TERM field name, the prompt table, by default, to return the ADMIT_TERM values is TERM_TBL. In Campus Solutions, you link defined terms to every academic career at an academic institution *(Set Up SACR, Foundation Tables, Term Setup, Term/Session Table, Term Table).* Therefore, if you enter in the Prompt Table Filters grid, the key field names - ACAD_CAREER and INSTITUTION - which are part of TERM_TBL, you will ensure that the service returns the proper admit term values in accordance to the user selections.

Additionally, use the Prompt Table Filters grid to list any non-key fields that can help filter even more the list of valid values returned to the users.

The grid functions like the conditions you would have in an SQL query. For instance, return values where *ACAD_CAREER = <value from the UI> AND INSTITUTION = 'PSUNV' (a constant).*

There are two ways to select a source for the key field name value:

- Select *XML Request* if you want the external UI user to populate the field name.

  Continuing with the previous example, you can select *XML Request* for ACAD_CAREER to make the external UI specify an academic career value when it requests for a list of admits term values. The Get List of Values service operation will use the field names marked with *XML Request* as input parameters.

- Specify a *Constant* if you want to force the UI to use a fixed value.

  Continuing with the previous example, you can specify a constant *PSUNV* for INSTITUTION in the Prompt Table Filters grid. This will ensure that the service knows that it has to return a list of admit term values for PSUNV. By forcing a constant value, you do not need to include the field inside the external UI (that is, the user does not need to see a field which is set up with a constant value).

Field Name

Enter the key and non-key fields to filter the list of valid values to return to the external UI. The system prompts you from the fields in the prompt table that you selected on the Prompt Table Edit group box.

Source

Define the source from where the value for the field name should come. Valid choices are:

- *Request XML*: Select to indicate that the external UI will provide the field value and include it as input parameters inside the list of values Request xml message.

  The value can either come from the user's selection, or be forced by custom UI logic. When you select *Request XML,* the Allow Blanks field appears.

- *Constant*: Select if you want to force a value for the specific field.

  When you select *Constant,* the Constant Value field appears.

Constant Value

Enter the constant value that the system should populate for the field name. The system will use the constant value to filter the list of valid values to return.

As an example, in the previous List of Values Setup page screen shot above, the setup indicates that the Get List of Values service operation should return a list of admit type values valid for the institution *PSUNV.*

This field appears when you select *Constant* in the Source field.

Allow Blanks

Select to indicate that the field value can be blank.

As an example, in the previous List of Values Setup page screen shot, the ADMIT_TYPE field name depends on the ACAD_CAREER key field name for its list of values and the Allow Blank check box has been selected for ACAD_CAREER. This is because the ADMIT_TYPE_TBL prompt table can not only store admit types for a specific career, but it can also store admit types for all careers. Therefore, the external UI may choose not to send an ACAD_CAREER value while requesting for admit types.

This check box appears when you select *XML Request* in the Source field.

Exclude Prompt Field Values

Use this group box to exclude all or some of the values returned by the Prompt Table you selected and by the Prompt Table Filter if you had set up field names with a constant value. For example, in the previous List of Values Setup page screen shot, the setup indicates that the INSTITUTION field name is marked with a constant value *PSUNV*. Using the Exclude Prompt Field Values grid, you can exclude any ADMIT_TYPE values from the prompt table selected (ADMIT_TYPE_TBL record) where INSTITUTION = *'PSUNV'*.

This group box is available for both types of fields: field names that have user-defined lists of values (prompt fields) and field names that have translate list of values.

Note. *Limitation*: The exclusions cannot be conditional. The service excludes the values that you select here regardless of the data that the external UI passes for the Prompt Table Filters fields. For instance, suppose you selected Prompt Table = 'ADM_APPL_DATA', Prompt Field = 'ACAD_CAREER', in the Prompt Table Filters grid you added field name INSTITUTION with Request XML and you excluded the value 'UGRD' (Undergraduate). Now Undergraduate may be a valid academic career for several of your institutions. In such a case, the UGRD value will be excluded regardless of the institution the users may select.

Populate Valid Values

Click to populate the Excluded Values grid with the field's values.

You can use this button as a utility to preview the values that the service will return to the users and then decide which values, if any, you want to specifically exclude.

Note. The Populate Valid Values button queries the prompt table that you selected and includes, as criteria, the constant values you may have entered inside the Prompt Table Filters grid. For instance, if you had entered in the Prompt Table Filters grid, the key field name INSTITUTION with a constant value of PSUNV, the button will query the prompt table where INSTITUTION = PSUNV. The result that the Excluded Values grid displays is a distinct list of the valid values for the selected field name. The Excluded Values grid also considers Effective Date and Effective Status when it displays the list of values.

Warning! Depending on the number of values to return, the processing time when you click the button can vary.

Remove All Values

Click to remove all the values from the Excluded Values grid.

Value

Specify the values that you want to exclude from the external UI users.

The system prompts you the values from the prompt field that you selected on the Prompt Table Edit group box. The prompt performs the same query as previously described for the Populate Valid Values button.

Description

Displays the value descriptions in accordance with the Field Description value you selected in the Prompt Table Edit group box.

If you have left the Field Description blank, the system does not populate this field.

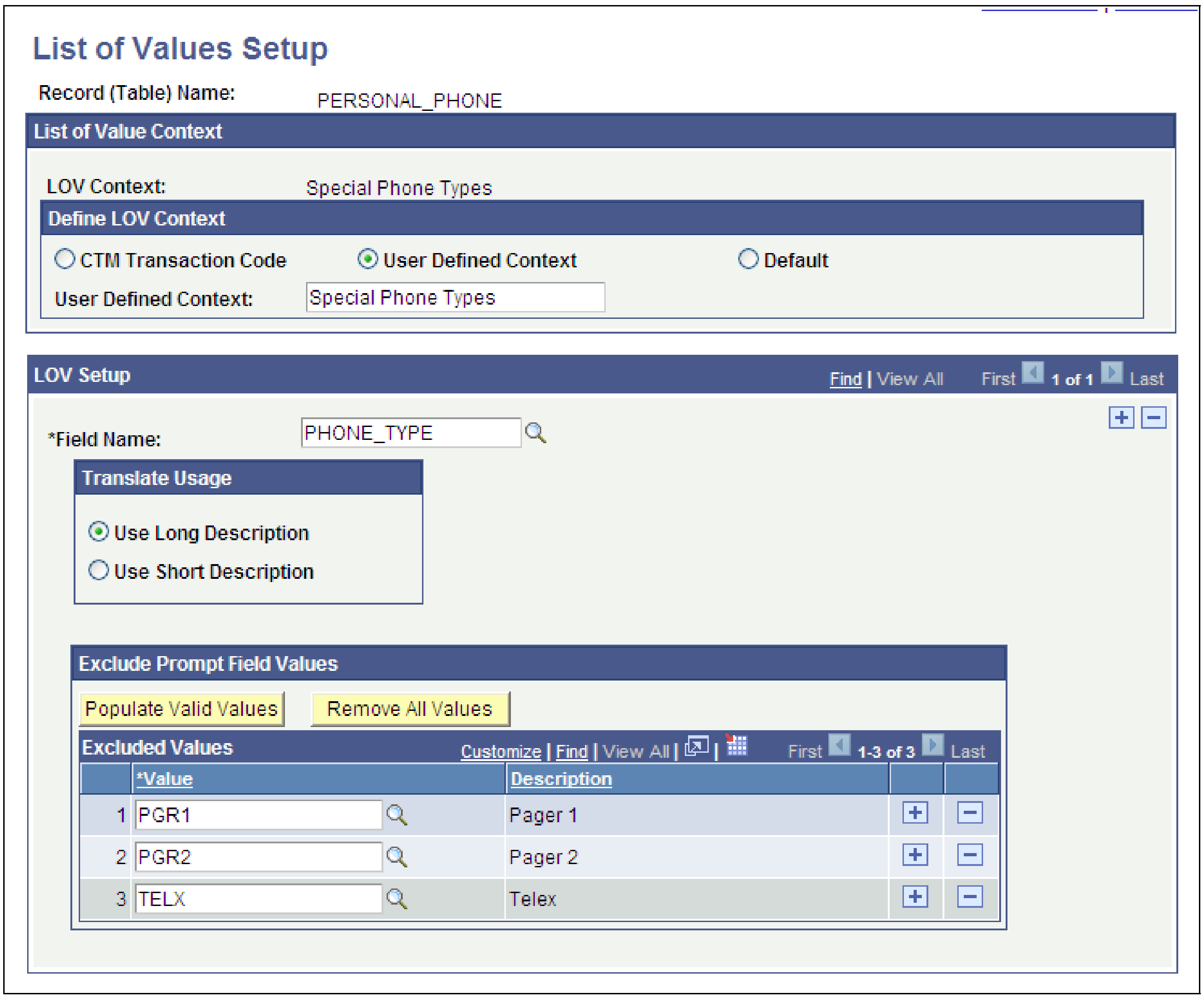
Setting up list of values for translate list of values

When you set up list of values for a field name that contains translate values, the system hides the Self-Service Mode and the Administrator Mode sections and displays the Translate Usage group box.

Use the Translate Usage group box to indicate whether you want the service to return either the long descriptions or the short descriptions as the list of values.

The Self-Service Mode and the Administrator Mode sections are not applicable for field names that have translate values.

The system also displays the Exclude Prompt Field Values grid, when you select a translate field name. The Exclude Prompt Field Values grid is described in the previous topic.



Example of a field with translate list of values

Chapter 29

Setting Up Entity Registry

At the time of publication of this PeopleBook, the latest version of the Setting Up Entity Registry chapter is available on the following My Oracle Support page, as part of the Campus Community documentation package for Bundle 23:

CS 9.0 Bundle #23 Functional Documentation and Additional Features October 2011 [ID 1371376.1]

Chapter 30

Using the Shopping Cart Framework

This Campus Community PeopleBook chapter provides an overview of the Shopping Cart framework and discusses:

- Shopping cart service operations.
- Shopping cart framework APIs.
- Defining a shopping cart.

Note. Technical developers, consultants and, implementers should use this PeopleBook chapter to identify the skills that are required for implementing the framework and to determine the scope of data that the shopping cart web service operations can exchange between a self-service user interface (that the academic institution builds) and the PeopleSoft Campus Solutions system. The framework uses the Campus Community Entity Registry feature to perform the data exchange and PeopleTools Integration Broker for the web services. Business and functional analysts should use this chapter to understand how the generic Shopping Cart framework functions.

Understanding the Shopping Cart Framework

The Shopping Cart framework provides the generic SCC_SHOPPING_CART service. You can use this service to implement a shopping cart for any Campus Solutions feature.

Like the other Campus Community frameworks, such as List of Values and Entity Registry, the Shopping Cart framework can be used by all Campus Solutions applications. Therefore, the Campus Solutions system maintains the framework code separately as Campus Community shared components. Examples of Campus Solutions applications include Campus Community, Financial Aid, Student Records, Recruiting and Admissions, and Student Financials.

The benefits of using the Shopping Cart framework include:

- Your effort in building a shopping cart for a Campus Solutions application or a feature is greatly reduced.

  The Shopping Cart framework supports the functionality common to all shopping carts, such as adding items, checking out items, and so on. With the framework already supporting the common functionality, your technical staff can focus their efforts in implementing user interfaces that use this framework.

- You can improve the code maintenance.

  For example, multiple shopping carts for various Campus Solutions applications or features can use the same Shopping Cart framework code. Therefore, with this framework, you are not repeating the code that is common to all shopping carts.

- A Campus Solutions application or feature can store the shopping cart data in its own tables, and add, delete, or modify this data.
- A shopping cart specific to an application or feature can have its own business logic.

  For example, you could add your own logic to validate whether the items, which the user wants to add to a shopping cart, satisfy certain conditions.

The following table lists the service operations for the SCC_SHOPPING_CART service.

Service Operation	*Operation Description*	*Request Message*	*Response Message*
SCC_SC_ADDITEM	Add an item to the cart	SCC_SC_ADDITEM_REQ	SCC_SC_ADDITEM_RESP
SCC_SC_CLEARCART	Clears the cart	SCC_SC_CLEARCART_REQ	SCC_SC_CLEARCART_RESP
SCC_SC_GETCART	Get cart request.	SCC_SC_GETCART_REQ	SCC_SC_GETCART_RESP
SCC_SC_GETITEM	Get an item from the cart.	SCC_SC_GETITEM_REQ	SCC_SC_GETITEM_RESP
SCC_SC_REMOVEITEM	Remove an item from the cart.	SCC_SC_REMOVEITEM_REQ	SCC_SC_REMOVEITEM_RESP
SCC_SC_SAVECART	Save the cart.	SCC_SC_SAVECART_REQ	SCC_SC_SAVECART_RESP
SCC_SC_VALIDATE	Validate cart item.	SCC_SC_VALIDATE_REQ	SCC_SC_VALIDATE_RESP
SCC_SC_CHECKOUT	Check out from the cart.	SCC_SC_CHECKOUT_REQ	SCC_SC_CHECKOUT_RESP

Note. The service operations listed in the preceding table are synchronous. These service operations use the SCC_FAULT_RESP message to return the error messages to the online user interface. The SCC_FAULT_RESP message is not part of the Shopping Cart framework, but is a common fault response message owned by Campus Community which any service operation could use to define fault response.

Assessing Staff Skills

Developers working on the implementation of shopping cart should have strong skills in:

- A tool or technology to build and deploy a user interface, especially if you want to create the user interface outside of the PeopleSoft Campus Solutions system using a language different than PeopleTools.
- PeopleSoft Integration Broker.
- PeopleCode.
- Web services concepts mainly XML, SOAP, and WSDL.

- Campus Community Entity Registry functionality.

Shopping Cart Service Operations

This section discusses the shopping cart service operations.

SCC_SC_ADDITEM

This service operation adds a single or multiple items to a user's shopping cart. The operation adds the items to the item table specific to the Campus Solutions application implementing the shopping cart.

The service operation first checks if the item, which the user wants to add, already exists in the cart. If the item already exists, the operation deletes the item from the cart and then adds the item as a new item to the cart. Therefore, a user interface can also use this operation to update an existing cart item.

Once the item is added to the cart, the service operation retrieves all the cart items for the user and sends them back in the response message.

Example: Suppose your institution has an enrollment shopping cart. A student can use this enrollment shopping cart to add the classes in which he or she wants to enroll. The enrollment shopping cart uses the SCC_SC_ADDITEM operation to add a class to the enrollment shopping cart item table.

Example when a shopping cart can use SCC_SC_ADDITEM to modify an existing item: Suppose a student wants to change an enrollment option. For example, the student wants to change the *Units* for an item that has already been added to the enrollment shopping cart. The student can add the same item with a changed value for *Units.* In this case, SCC_SC_ADDITEM deletes the existing item and adds it again with the new value for *Units.*

SCC_SC_CLEARCART

This service operation deletes all the items from the cart for a user. The operation deletes the items from the item table specific to the Campus Solutions application implementing the shopping cart.

Example: A student deletes all the classes that he or she added previously to the enrollment shopping cart. In such a case, the enrollment shopping cart uses the SCC_SC_CLEARCART operation to delete all the classes added by the student.

SCC_SC_GETCART

This service operation retrieves all the items added to the shopping cart for a user. The operation retrieves the items from the item table specific to the Campus Solutions application implementing the shopping cart.

Example: A student accesses the enrollment shopping cart to make additional changes. The shopping cart displays all the classes that the student had previously entered. In such a case, the enrollment shopping cart uses the SCC_SC_GETCART operation to retrieve all the classes that the user had previously added to the enrollment shopping cart.

SCC_SC_GETITEM

This service operation retrieves a particular item from the shopping cart for a user, based on an index number. The index number is a numeric value that represents the position of an item in the cart.

A user interface can send the index number as a request parameter to this service operation. The service operation then uses the index number to retrieve the appropriate item from the cart. The operation first validates the index number and then retrieves the item only if it is a valid index number. If index number is not valid, the operation sends back an error message to the user interface stating that the index number is invalid.

For instance, if the index number in the request message passed to this service operation is greater than the number of items in the cart, then an error message is sent back to the user interface.

Example: A student wants to review details of a specific class that he or she had previously added to the enrollment shopping cart. To review the class details, the student clicks the class number link. In such a case, the enrollment shopping cart feature uses the SCC_SC_GETITEM operation to retrieve the details of the particular class.

The user interface could initially use the SCC_SC_GETCART operation to display only the basic information (for example, Class Nbr) for all the cart items (academic classes). To get more information about the classes, the student can click any class number. When the student clicks a class number, the user interface can use the SCC_SC_GETITEM operation to retrieve and display the complete information for that item.

SCC_SC_REMOVEITEM

This service operation removes a single or multiple items from the shopping cart for a user.

Once the item is removed from the cart, the service operation retrieves all the remaining cart items for the user and sends them back in the response message. In other words, the response message will contain the remaining cart items. However, the response message will be blank if the cart is empty after the removal of an item.

Example: A student deletes one or more classes from the enrollment shopping cart. In such a case, the enrollment shopping cart uses the SCC_SC_REMOVEITEM operation to remove a class from the enrollment shopping cart.

SCC_SC_SAVECART

This service operation saves a single or multiple items to the cart for a user. The service operation first deletes all the items in the cart for the user and then adds the new items to the cart.

Once the items are saved to the cart, the service operation retrieves all the cart items for the user and sends them back in the response message. In other words, if an error does not occur, the response message contains all the cart items.

There is a difference between SCC_SC_ADDITEM and SCC_SC_SAVECART. If an item already exists in the cart and the user adds it again, SCC_SC_ADDITEM first removes the item from the table and then adds the item again. SCC_SC_SAVECART first deletes all the existing cart items and then adds all the items that are in the request message.

Example: A student uses the enrollment shopping cart to clear all the existing cart items and then adds the new classes in which he or she wants to enroll. After adding the new classes, the student clicks the save link. In such a case, the enrollment shopping cart uses the SCC_SC_SAVECART operation to first remove the existing cart items and then add the new classes to the enrollment shopping cart item table.

SCC_SC_VALIDATE

This service operation validates the items in the cart for a user. A user interface can use this operation to validate a single or multiple items in the cart. The validation results of all the items indicating a success or failure is sent back in the response message.

Example: A student adds three classes to the enrollment shopping cart. Before the student checks out these classes, the user interface validates the class choices. After validation, the user interface determines that the student is eligible to enroll only in one specific class. The enrollment shopping cart uses the SCC_SC_VALIDATE operation to perform such a pre enrollment validation.

The SCC_SC_VALIDATE operation enables a user interface to first validate the classes that exist in the enrollment shopping cart, before the user interface invokes the SCC_SC_CHECKOUT operation to enroll the student in the classes. On successful validation of the class, the SCC_SC_VALIDATE operation sends back a response message: *OK to Add.* If any error occurs during validation, the response message contains the appropriate error message.

Note. The validation code should be specific to the shopping cart feature that you are implementing. Therefore, whoever implements a shopping cart needs to create feature-specific validation logic as part of the adopting feature's application class. In the preceding example, the enrollment validation logic is not part of the Shopping Cart framework. We have incorporated this enrollment validation logic in the CourseShoppingCart application class, *validateCart* method (part of SSR_COURSE application package). This class and method are specific to the enrollment shopping cart. The *validateCart* method executes when the enrollment shopping cart user interface invokes the SCC_SC_VALIDATE service operation.

SCC_SC_CHECKOUT

This service operation checks out the items that the user has added to the cart. A user interface can use this operation for a single or multiple cart items. The service operation sends back a response message indicating success or failure.

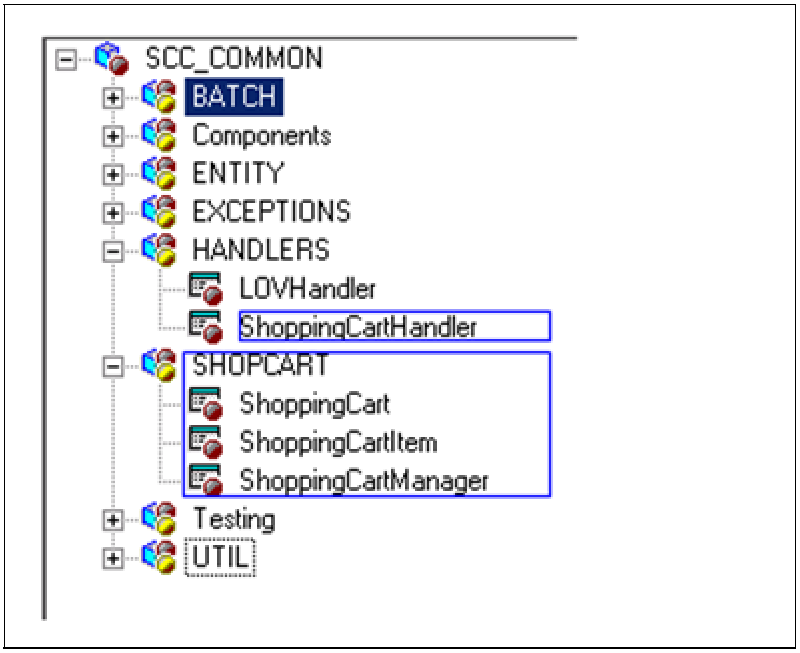
Example: After adding all the desired classes to the enrollment shopping cart, the student confirms his or her choices by checking out the items. The enrollment shopping cart uses the SCC_SC_CHECKOUT operation to check out (enroll) the classes added to the enrollment shopping cart. On successful enrollment, the response message returns the following message to the student: *The class has been added to your schedule.* If any error occurs during enrollment, the response message contains the appropriate error message.

Note. The checkout code should be specific to the shopping cart feature that you are implementing. Therefore, whoever implements a shopping cart needs to create feature-specific checkout logic as part of the adopting feature's application class. In the preceding example, the enrollment checkout logic is not part of the Shopping Cart framework. We have incorporated this enrollment checkout logic in the CourseShoppingCart application class, *purchase* method (part of SSR_COURSE application package). This class and method are specific to the enrollment shopping cart. The *purchase* method executes when the enrollment shopping cart user interface invokes the SCC_SC_CHECKOUT service operation.

Shopping Cart Framework APIs

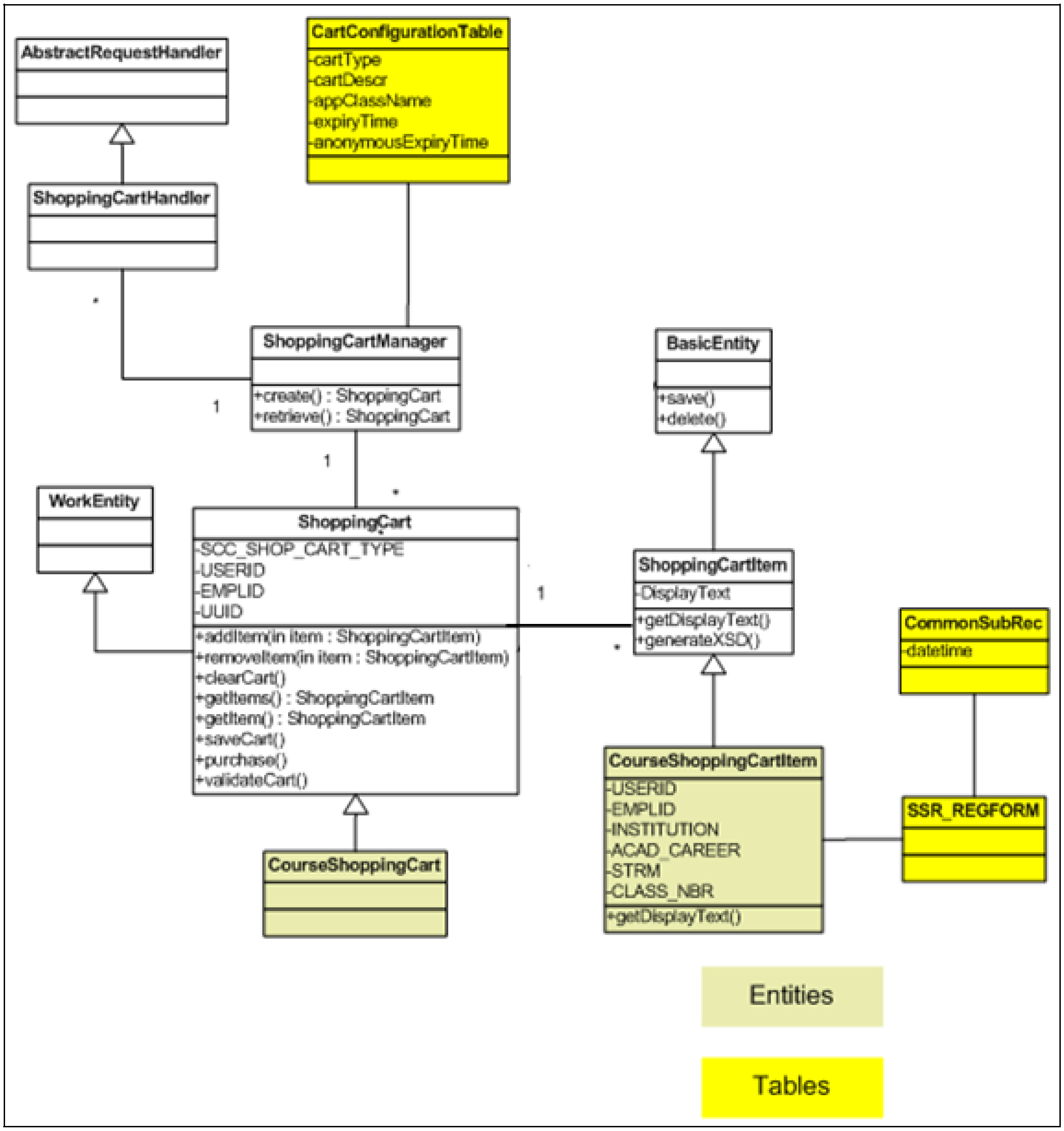
This section discusses the classes that you can use for implementing a shopping cart.

The Shopping Cart framework supports a set of Application Programming Interfaces (APIs) that comprise the functionality common to all shopping carts. These APIs are application classes. These APIs exist in the SCC_COMMON application package as shown in the following diagram:



Shopping cart APIs in the SCC_COMMON application package

The following diagram shows the delivered enrollment shopping cart implementation. This implementation uses the Shopping Cart framework, and the delivered CourseShoppingCart and CourseShoppingCartItem entities.



Example of a delivered shopping cart implementation

The following table describes the delivered classes that are shown in the preceding diagram.

Classes/Tables	***Description***
CartConfigurationTable	This table contains details about the available carts and the implementation classes that support these carts. The database table for CartConfigurationTable is SCC_SHOPCART.
ShoppingCartHandler	This class is the only web service handler that the system needs to drive the shopping cart. To access the Shopping Cart framework, all the web services will use this web service handler. This class is part of the SCC_COMMON application package.

Classes/Tables	*Description*
ShoppingCartManager	The generic handler class uses the ShoppingCartManager core class to create and return the appropriate entity specific to the Campus Solutions application. Additionally, a user interface can use the ShoppingCartManager class to retrieve the items from a cart specific to the Campus Solutions application. This class is part of the SCC_COMMON application package.
ShoppingCart	This core class contains the common functions available to all carts. Note that we have modeled this class as a WorkEntity and therefore, this class does not require real database persistence (table). The feature, adopting the Shopping Cart framework, must extend this class. This class is part of the SCC_COMMON package. **Note.** The purchase() & validateCart() methods, which are used by the SCC_SC_CHECKOUT and SCC_SC_VALIDATE service operations respectively, are defined as abstract in the ShoppingCart class. Therefore, you must provide the implementation code in the adopting class.
ShoppingCartItem	The adopting feature must extend this core class to hold any items in the cart. Note that we have modeled this class as a BasicEntity having a real underlying database table that will contain the cart items. This class is part of the SCC_COMMON package.
BasicEntity	You must create the adopting feature entity with an entity type set to ShoppingCartItem. We have defined this type with the base application class called SCC:COMMON:SHOPCART:ShoppingCartItem. This base class extends the SCC_COMMON:ENTITY:BasicEntity application class. Therefore, when creating a shopping cart, you create an application class that extends the BasicEntity class. The BasicEntity class is part of the SCC_COMMON package.
CommonSubRecord	This is a table that contains the Shopping Cart framework's common fields that any adopting feature's item table should include. This enables the cart to track the common system data, with no effort from the adopting feature. The database table for CommonSubRecord is SCC_SHOPCRT_SBR.
CourseShoppingCart	This class pertains to the implementation for enrollment shopping cart. This class is part of the SSR_COURSE application package. The CourseShoppingCart class extends the core ShoppingCart class. The CourseShoppingCart class contains the implementation for the purchase() & validateCart() methods that are abstract in the core ShoppingCart class. Note that the CourseShoppingCart class is attached to a work entity (SCC_SHOPCRT_WRK) because the class has nothing to save and therefore does not require a real database table.
CourseShoppingCartItem	This class pertains to the implementation for enrollment shopping cart (which is specific to the Student Records Campus Solutions application). This class is part of the SSR_COURSE application package. This class handles the storage of the enrollment shopping cart items (academic classes). The CourseShoppingCartItem entity is attached to the enrollment shopping cart item table (SSR_REGFORM) that holds the enrollment shopping cart items (academic classes).
WorkEntity	This class is extended by entities that have nothing to save, meaning they do not have a real underlying database table. The core ShoppingCart class extends WorkEntity. The WorkEntity class is part of the SCC_COMMON package.

Defining a Shopping Cart

This section describes how to use the Shopping Cart framework as a base to create a shopping cart specific to a Campus Solutions application. The section uses the delivered enrollment shopping cart to show an example of how this is done.

This section discusses how to:

- Create application class.
- Set up entity registry.
- Generate code for application classes.
- Configure shopping cart.
- Generate a common XSD for the shopping carts.

Creating Application Classes

Create feature-specific shopping cart application classes to customize the business logic specific to the Campus Solutions application. At this stage, create only the application classes inside the proper application package. Add the PeopleCode at a later step.

Typically, any shopping cart feature would include XXXShoppingCart & XXXShoppingCartItem classes where XXX points to the specific feature for which the shopping cart is created (for example, Course and Student Financials). These are the application class names that you will associate with the corresponding entities on the Entity Registry page in the next step.

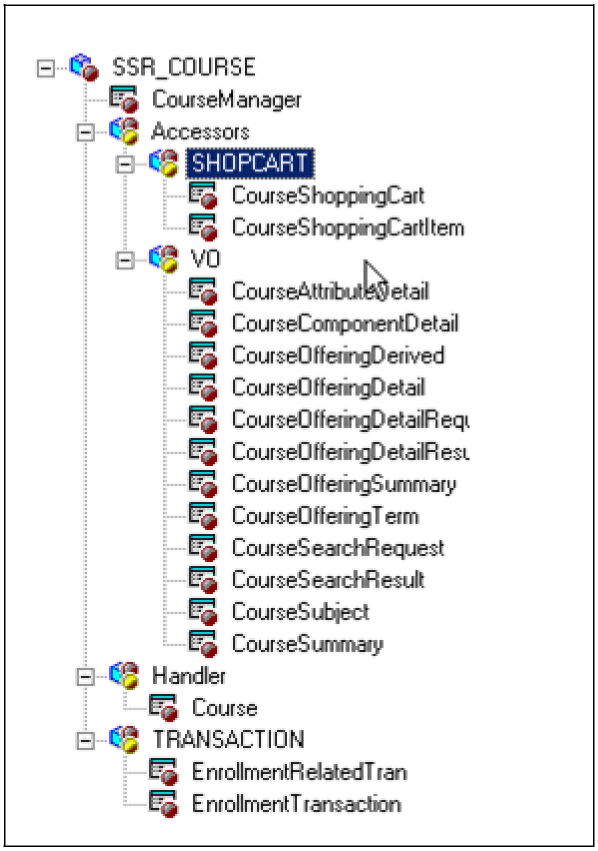
The XXXShoppingCart class extends the core ShoppingCart class and contains the implementation code for the purchase() method. The SCC_SC_CHECKOUT service operation uses the purchase() method and the SCC_SC_VALIDATE service operation uses the validateCart() method. The system has defined the purchase() method and validateCart() method as abstract in the ShoppingCart base class. The XXXShoppingCart class can also override any other class provided by the base class for providing customized implementation specific to the Campus Solutions application.

The XXXShoppingCartItem class must point to the record where the system will store the shopping cart items.

For example, for the enrollment shopping cart we created the following two classes (APIs):

- CourseShoppingCart.
- CourseShoppingCartItem.

The following diagram shows that we have included both the classes inside the SSR_COURSE application package. This package is specific to the Campus Solutions Student Records application. The CourseShoppingCartItem class points to the SSR_REGFORM record. The system stores the cart items (academic classes in the case of enrollment shopping cart) in the SSR_REGFORM record.



Example of how you can create the classes for a shopping cart

Setting Up Entity Registry

Access the Entity Registry page (Set Up SACR, System Administration, Entity, Entity Registry).

The Shopping Cart framework uses the Entity Registry component for processing shopping cart requests specific to the Campus Solutions application. Use the Entity Registry component to define entity registries for each application-specific cart.

In the previous subsection (Creating Application Classes), we created two application classes: CourseShoppingCart and CourseShoppingCartItem. We will now attach each of these classes to an entity. Access the Entity Registry component to create a parent and at least one child entity. Any entity structure for an application-specific shopping cart should include a parent class that will extend the base ShoppingCart class. This parent class provides implementation for all of the service operations. The child class is needed because it points to the actual application-specific cart item table. If the application-specific feature has multiple child item tables, then you should create entities for all children and also define the parent-child relationship in the Entity Registry component.

Create the parent entity with the following configuration:

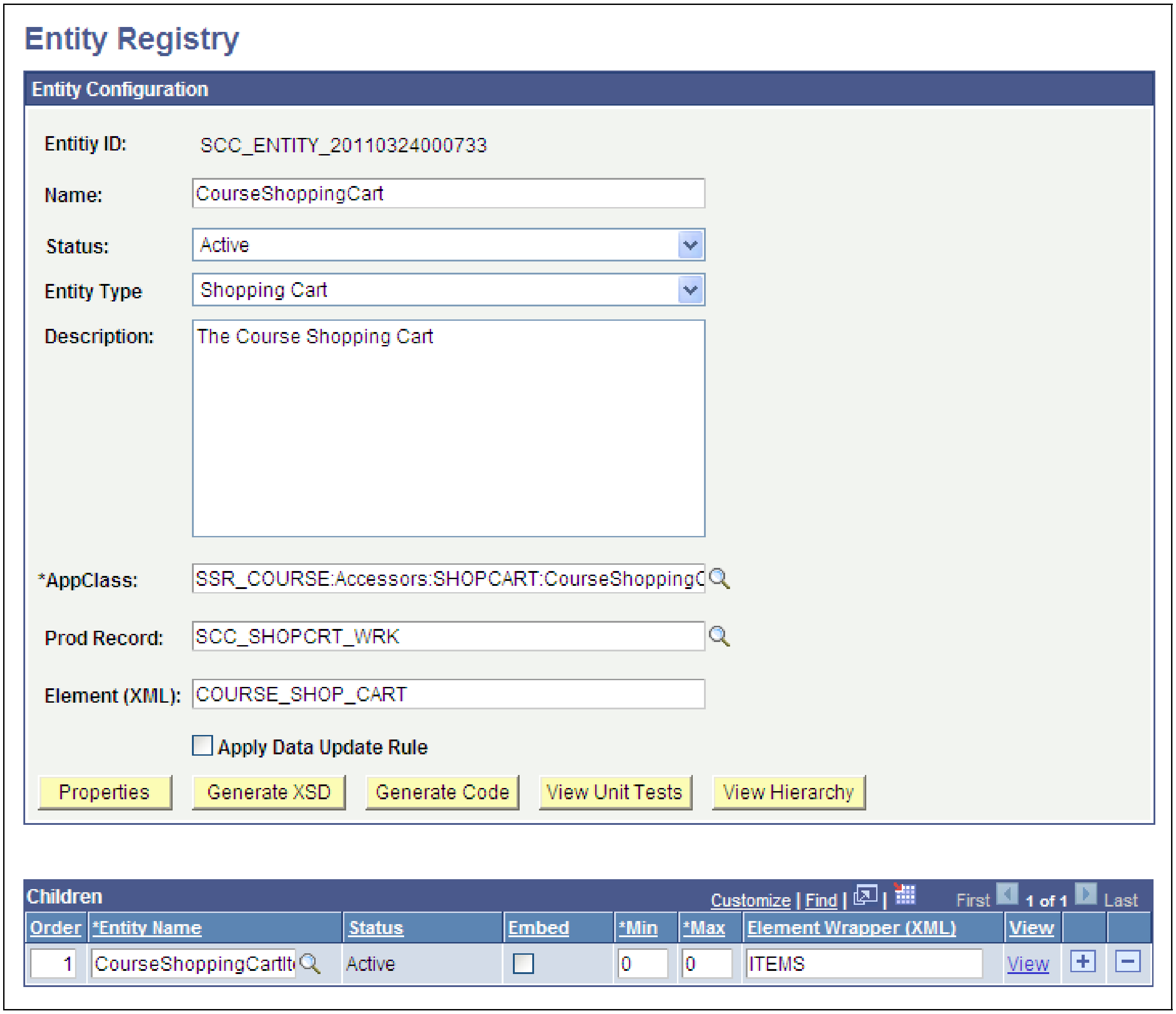
- Specify the entity name as *XXXShoppingCart.*

  This is similar to how you named the application class in the previous subsection. XXX refers to the feature for which you are creating a shopping cart.

- Select a value of *Shopping Cart* in the Entity Type field.

- For the AppClass field, select the application class you created in the previous subsection for *XXXShoppingCart.*
- For the Prod Record field, select the work record *SCC_SHOPCRT_WRK* because the entity will have nothing to save.

This example shows the parent entity, named CourseShoppingCart, which we created for the enrollment shopping cart:



Configuration example of a parent entity (CourseShoppingCart)

Create the child entity with the following configuration:

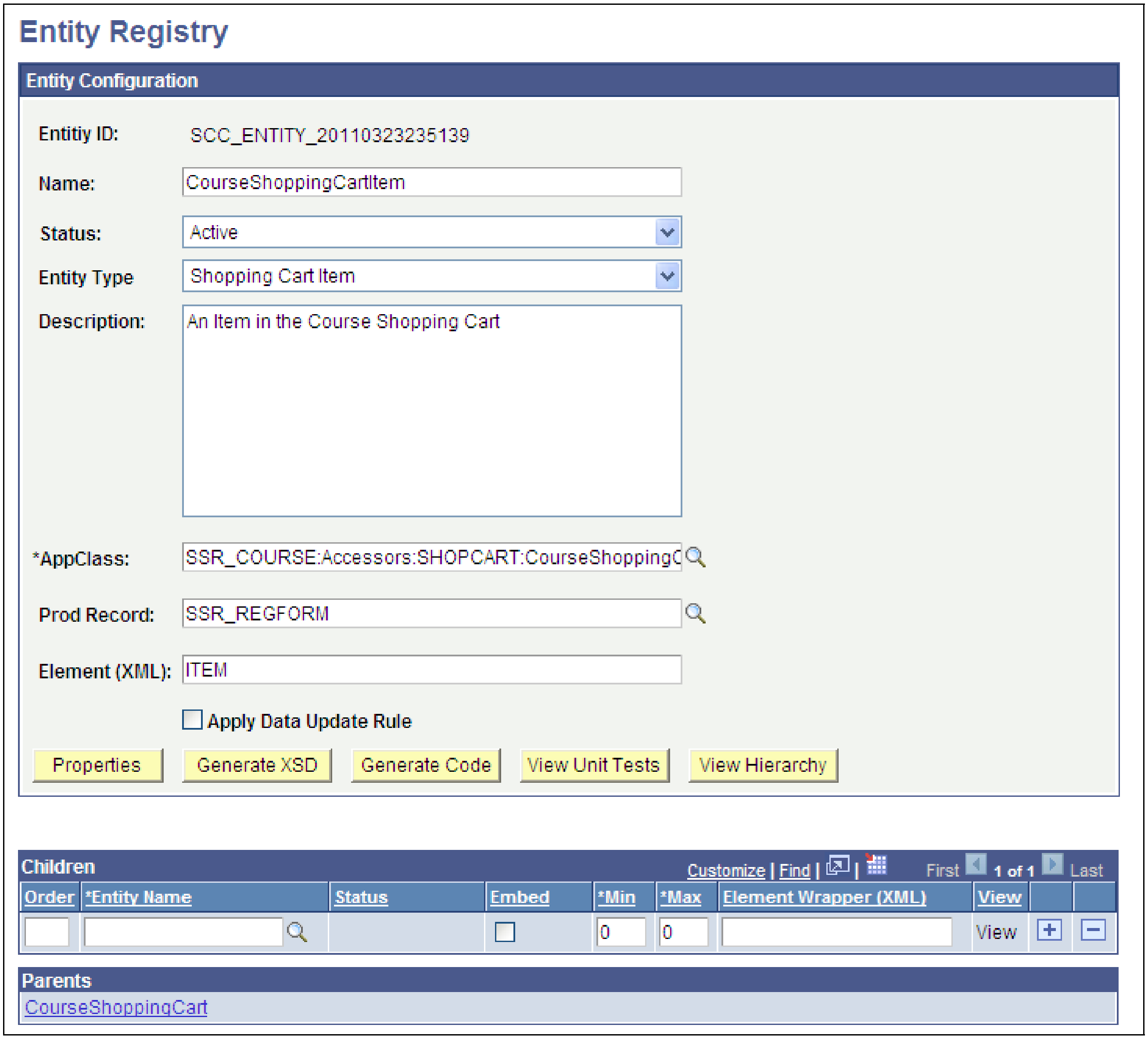
- Specify the entity name as *XXXShoppingCartItem.*

  This is similar to how you named the application class in the previous subsection. XXX refers to the feature for which you are creating a shopping cart.

- Select a value of *Shopping Cart Item* in the Entity Type field.

- For the AppClass field, select the application class you created in the previous subsection for *XXXShoppingCartItem.*
- For the Prod Record field, select the application-specific item table that will hold the cart items.

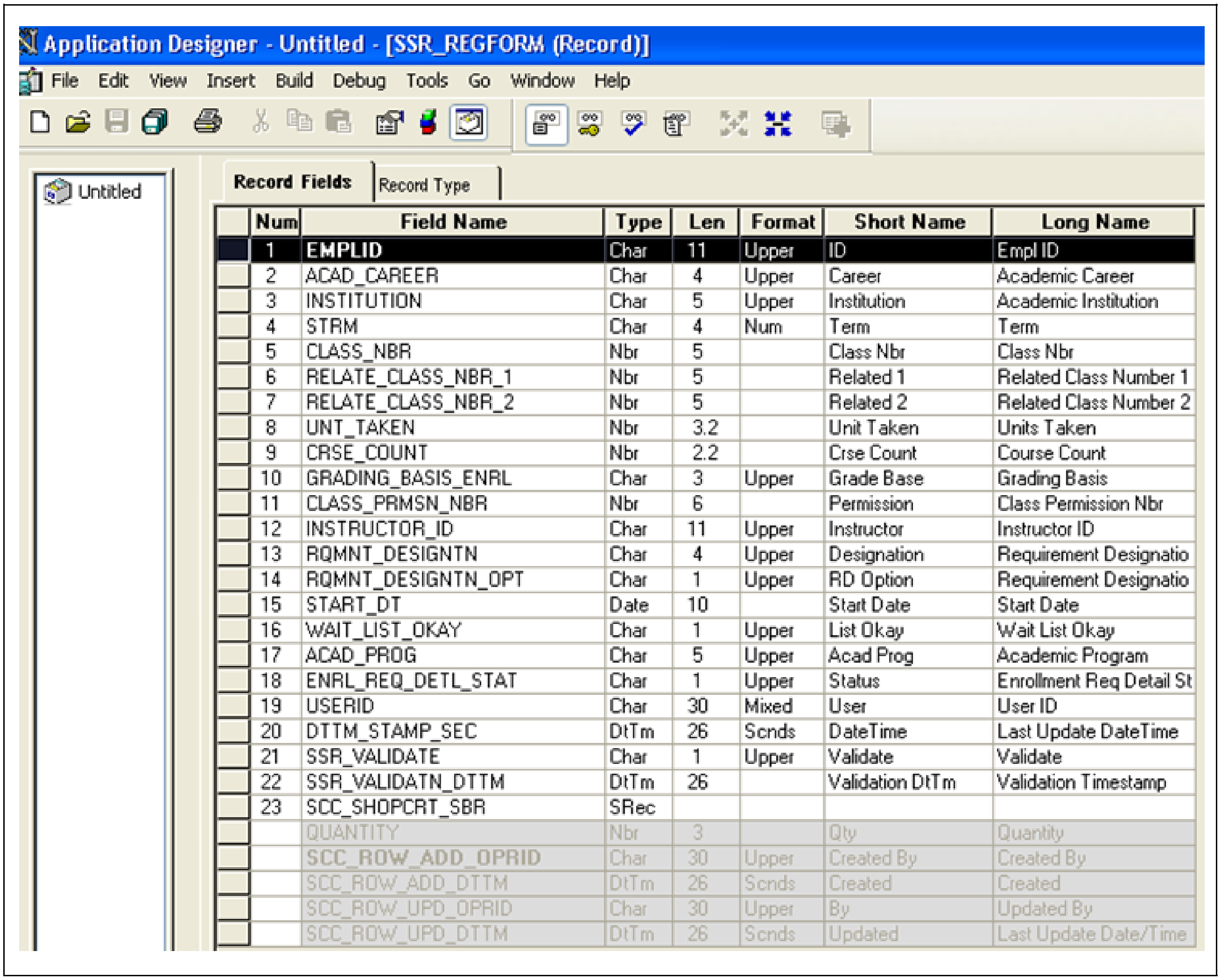
This example shows the child entity, named CourseShoppingCartItem, which we created for the enrollment shopping cart:



Configuration example of a child entity (CourseShoppingCartItem)

Note. The record you enter in the Prod Record field for the child entity must contain the SCC_SHOPCRT_SBR *(CommonSubRecord)* sub record. That is, you must include SCC_SHOPCRT_SBR in the application-specific item table. This enables the common system data to be tracked by the Shopping Cart framework without any effort from the adopting feature. The SCC_SHOPCRT_SBR sub record contains the Shopping Cart framework's common fields that an adopting feature should include.

The following example shows how you should create the production record for the child entity:



Num	Field Name	Type	Len	Format	Short Name	Long Name
1	EMPLID	Char	11	Upper	ID	Empl ID
2	ACAD_CAREER	Char	4	Upper	Career	Academic Career
3	INSTITUTION	Char	5	Upper	Institution	Academic Institution
4	STRM	Char	4	Num	Term	Term
5	CLASS_NBR	Nbr	5		Class Nbr	Class Nbr
6	RELATE_CLASS_NBR_1	Nbr	5		Related 1	Related Class Number 1
7	RELATE_CLASS_NBR_2	Nbr	5		Related 2	Related Class Number 2
8	UNT_TAKEN	Nbr	3.2		Unit Taken	Units Taken
9	CRSE_COUNT	Nbr	2.2		Crse Count	Course Count
10	GRADING_BASIS_ENRL	Char	3	Upper	Grade Base	Grading Basis
11	CLASS_PRMSN_NBR	Nbr	6		Permission	Class Permission Nbr
12	INSTRUCTOR_ID	Char	11	Upper	Instructor	Instructor ID
13	RQMNT_DESIGNTN	Char	4	Upper	Designation	Requirement Designatio
14	RQMNT_DESIGNTN_OPT	Char	1	Upper	RD Option	Requirement Designatio
15	START_DT	Date	10		Start Date	Start Date
16	WAIT_LIST_OKAY	Char	1	Upper	List Okay	Wait List Okay
17	ACAD_PROG	Char	5	Upper	Acad Prog	Academic Program
18	ENRL_REQ_DETL_STAT	Char	1	Upper	Status	Enrollment Req Detail St
19	USERID	Char	30	Mixed	User	User ID
20	DTTM_STAMP_SEC	DtTm	26	Scnds	DateTime	Last Update DateTime
21	SSR_VALIDATE	Char	1	Upper	Validate	Validate
22	SSR_VALIDATN_DTTM	DtTm	26		Validation DtTm	Validation Timestamp
23	SCC_SHOPCRT_SBR	SRec				
	QUANTITY	Nbr	3		Qty	Quantity
	SCC_ROW_ADD_OPRID	Char	30	Upper	Created By	Created By
	SCC_ROW_ADD_DTTM	DtTm	26	Scnds	Created	Created
	SCC_ROW_UPD_OPRID	Char	30	Upper	By	Updated By
	SCC_ROW_UPD_DTTM	DtTm	26	Scnds	Updated	Last Update Date/Time

Example of a production record for a child entity

Generating Code for Application Classes

In the previous subsection (Setting Up Entity Registry), we created two entities and assigned the application classes to the entities. We will now click the Generate Code button on the Entity Registry page to generate the code that can be pasted inside the PeopleCode of the application class.

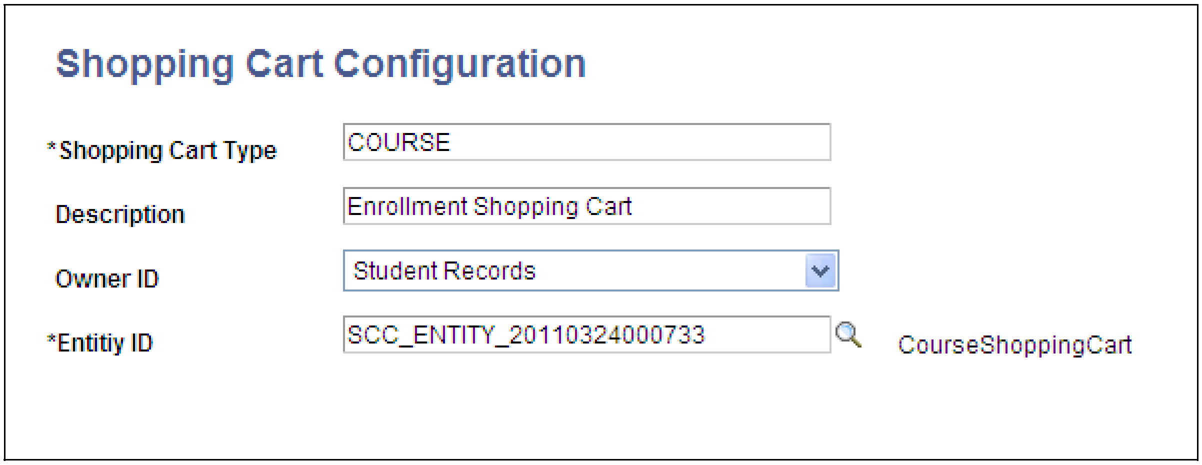
To generate the code:

1. Access the Entity Registry page for the XXXShoppingCart and the XXXShoppingCartItem entities.
2. Click the Generate Code button.
3. Select the desired options and generate the code.

You can paste the generated code directly inside the application classes. You can also use the generated code as a template to add more logic as needed.

Configuring Shopping Cart

To register the application-specific shopping cart, access the Shopping Cart Configuration page (Set Up SACR, System Administration, Utilities, Shopping Carts, Shopping Cart).



Shopping Cart Configuration page

Owner ID Because the Shopping Cart framework can be used by any Campus Solutions application, select the Campus Solutions application that will own the shopping cart you are creating.

Entity ID Select the Entity ID of the parent entity that you created on the Entity Registry page.

On the Shopping Cart Configuration page, you attach the entity ID of an application-specific shopping cart to an application-specific shopping cart type. The shopping cart type represents the type of the application-specific shopping cart, and the entity ID represents the application-specific entity defined on the Entity Registry page.

Purpose of this configuration:

Because the Shopping Cart framework is generic, the service operation will need to know which application-specific shopping cart sent the request so that it can proceed with first building the appropriate entities that are specified on the Shopping Cart Configuration page and then start processing the request.

Each shopping cart request must contain a <SCC_SHOP_CART_TYPE> tag. The value of the tag indicates the shopping cart type that you have defined on the Shopping Cart Configuration page. Any shopping cart service operation upon receiving a request will first read the shopping cart type from the request. Once the service operation identifies the cart type, it then identifies the appropriate entities attached to this cart type from the Shopping Cart Configuration page to perform the application-specific shopping cart processing.

Example for how the framework uses SCC_SHOP_CART_TYPE:

The enrollment shopping cart involves two entities: CourseShoppingCart and CourseShoppingCartItem. We have defined these entities on the Entity Registry page with CourseShoppingCart as the parent entity and CourseShoppingCartItem as the child entity. The shopping cart configuration for the enrollment shopping cart would therefore look as shown in the preceding screen shot titled *Shopping Cart Configuration page.*

Note that the shopping cart is *Course* in the screen shot for the enrollment shopping cart. Therefore, for example, when the enrollment shopping cart sends a request to add an item (academic class) to the enrollment shopping cart, the request must include the shopping cart type *Course.* The following is an example of a request XML code to add an item to the enrollment shopping cart:

```xml
<?xml version="1.0"?>
<SCC_SC_ADDITEM_REQ xmlns="http://xmlns.oracle.com/Enterprise/HCM/services">
 <SHOPPING_CART>
  <COURSE_SHOP_CART>
   <SCC_SHOP_CART_TYPE>COURSE</SCC_SHOP_CART_TYPE>
   <ITEMS>
    <ITEM>
     <SCC_ENTITY_INST_ID>ITEM ROW :1</SCC_ENTITY_INST_ID>
     <EMPLID>SR12030</EMPLID>
     <INSTITUTION>PSUNV</INSTITUTION>
     <ACAD_CAREER>UGRD</ACAD_CAREER>
     <STRM>0665</STRM>
     <CLASS_NBR>1014</CLASS_NBR>
     <WAIT_LIST_OKAY>N</WAIT_LIST_OKAY>
     <CLASS_PRMSN_NBR>0</CLASS_PRMSN_NBR>
     <GRADING_BASIS_ENRL></GRADING_BASIS_ENRL>
     <UNT_TAKEN>0</UNT_TAKEN>
     <INSTRUCTOR_ID></INSTRUCTOR_ID>
     <RQMNT_DESIGNTN_OPT></RQMNT_DESIGNTN_OPT>
     <START_DT></START_DT>
     <CRSE_COUNT>0</CRSE_COUNT>
     <ACAD_PROG></ACAD_PROG>
     <RELATE_CLASS_NBR_1>0</RELATE_CLASS_NBR_1>
     <RELATE_CLASS_NBR_2>0</RELATE_CLASS_NBR_2>
    </ITEM>
   </ITEMS>
  </COURSE_SHOP_CART>
 </SHOPPING_CART>
</SCC_SC_ADDITEM_REQ>
```

Sample SCC_SC_ADDITEM_REQ.xml from the Enrollment shopping cart

Note that in the code example, the SCC_SHOP_CART_TYPE tag contains the *COURSE* value. The SCC_SC_ADDITEM service operation reads the cart type value of Course from the request. The operation then queries the Shopping Cart Configuration page to identify the entity appropriate for this cart type (which is CourseShoppingCart for this example) and then proceeds with building the entity hierarchy for processing the enrollment shopping cart request.

Suppose if the <SCC_SHOP_CART_TYPE> had a value of StudentFinance. In such a case, the service operation builds the StudentFinanceShopCart entity and uses this entity for processing the Student Financials shopping cart request to add an item.

Therefore, depending on the <SCC_SHOP_CART_TYPE> value (for example, Course or StudentFinance) with which you have registered the application-specific entities on the Shopping Cart Configuration page, the service operation handler code builds the appropriate entities and uses these entities for further processing.

Generating a Common XSD for the Shopping Carts

The Shopping Cart framework uses a common schema that includes elements of all the entities that are defined in the shopping cart configuration table. The name of the common schema is SCC_ENTITY_SHOP_CART.xsd.

To generate the common schema for all the shopping carts:

1. Access the Entity Registry page for any parent entity of a shopping cart (Set Up SACR, System Administration, Entity, Entity Registry).
2. Click the Generate XSD button to generate the XSD.
3. Use the PeopleTools Schema page to access SCC_ENTITY_SHOP_CART.xsd (PeopleTools, Integration Broker, Integration Setup, Messages, Schema).
4. Paste the generated XSD into SCC_ENTITY_SHOP_CART.xsd.

For example, the enrollment shopping cart has two entities: CourseShoppingCart (parent) and CourseShoppingCartItem (child). Click the Generate XSD button on the Entity Registry page for the CourseShoppingCart entity. When you click this button, the system generates an XSD that will contain elements of all the available shopping cart entities that you have defined on the Shopping Cart Configuration page.

Any shopping cart parent entity (for example, CourseShoppingCart) extends the ShoppingCart framework class. The ShoppingCart class overrides the base class generateXSD() method to generate a common XSD for all the available carts. You will then need to replace the XSD in SCC_ENTITY_SHOP_CART.xsd with the XSD generated by clicking the Generate XSD button. Note that it is this common XSD that the system references in all the generic XSDs of the messages that are attached to the service operations.

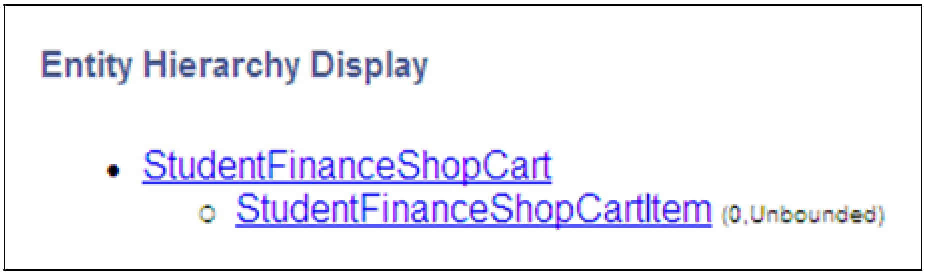
Another example: We will use the message SCC_SC_ADDITEM_REQ.xsd that is attached to SCC_SC_ADDITEM service operation. Suppose you have used the Shopping Cart Configuration page to define two shopping carts. One is an enrollment shopping cart and another is Student Financials shopping cart.

You defined the entity registry setups for the enrollment and Student Financials shopping carts. The following is an example of the Entity Hierarchy Display page for the CourseShoppingCart entity:

Entity hierarchy for Enrollment shopping cart

Note. We have registered CourseShoppingCart on the Shopping Cart Configuration page with Shopping Cart Type as *COURSE*.

The following is an example of the Entity Hierarchy Display page for the StudentFinanceShopCart entity:



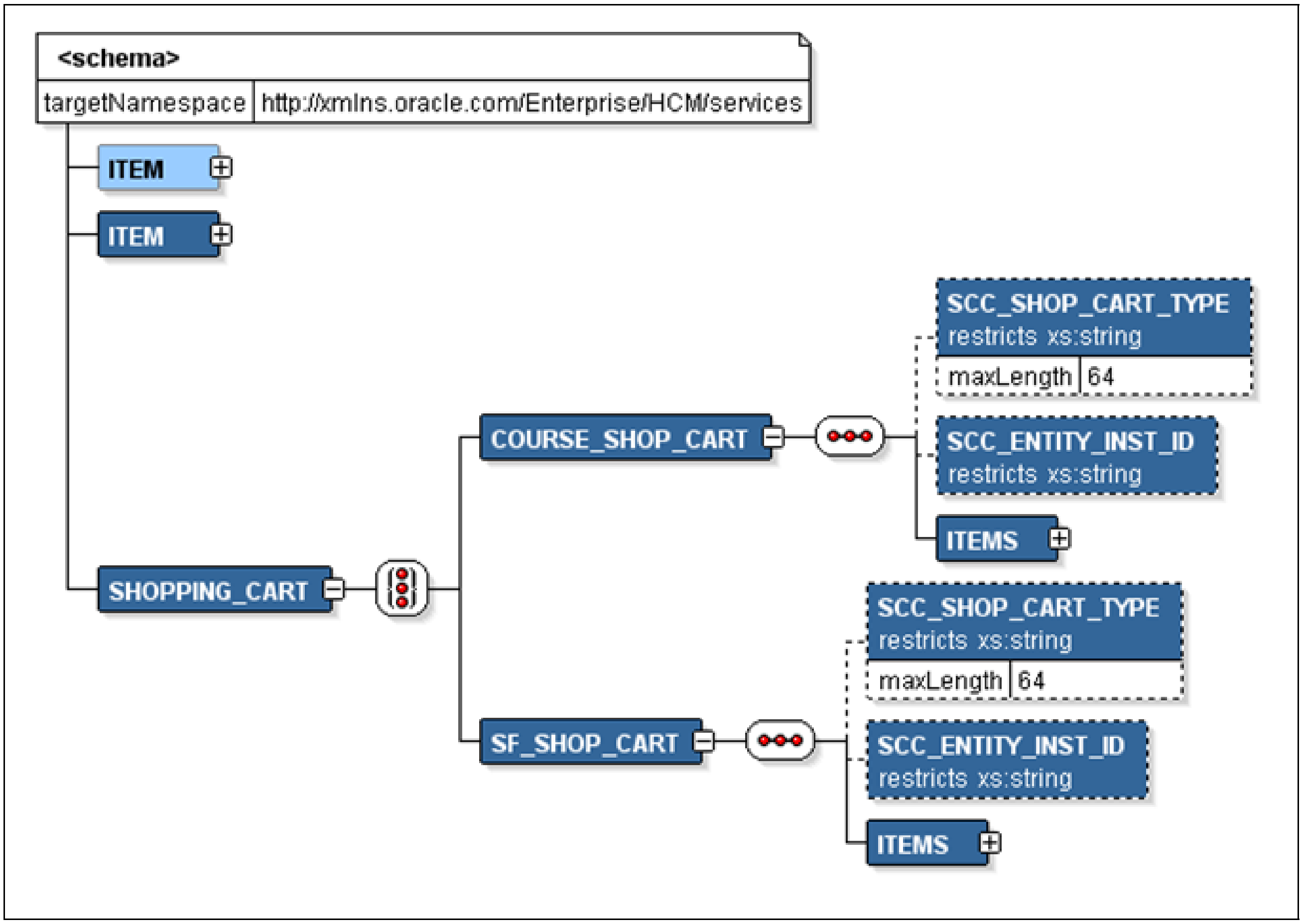
Entity hierarchy for Student Finance shopping cart

Note. Assume that you have registered StudentFinanceShopCart on the Shopping Cart Configuration page with Shopping Cart Type as *StudentFinance*.

Click the Generate XSD button for one of the parent entities, for example, CourseShoppingCart. Doing so generates an XSD that contains the elements from CourseShoppingCart entity hierarchy as well as from StudentFinanceShopCart entity hierarchy.

Replace the content of SCC_ENTITY_SHOP_CART.xsd with the generated XSD. To do so, select *PeopleTools, Integration Broker, Integration Setup, Messages, Schema* to access the SCC_ENTITY_SHOP_CART message. On the Schema page, paste the newly-generated XSD.

The following is a graphical representation of the SCC_ENTITY_SHOP_CART.xsd:

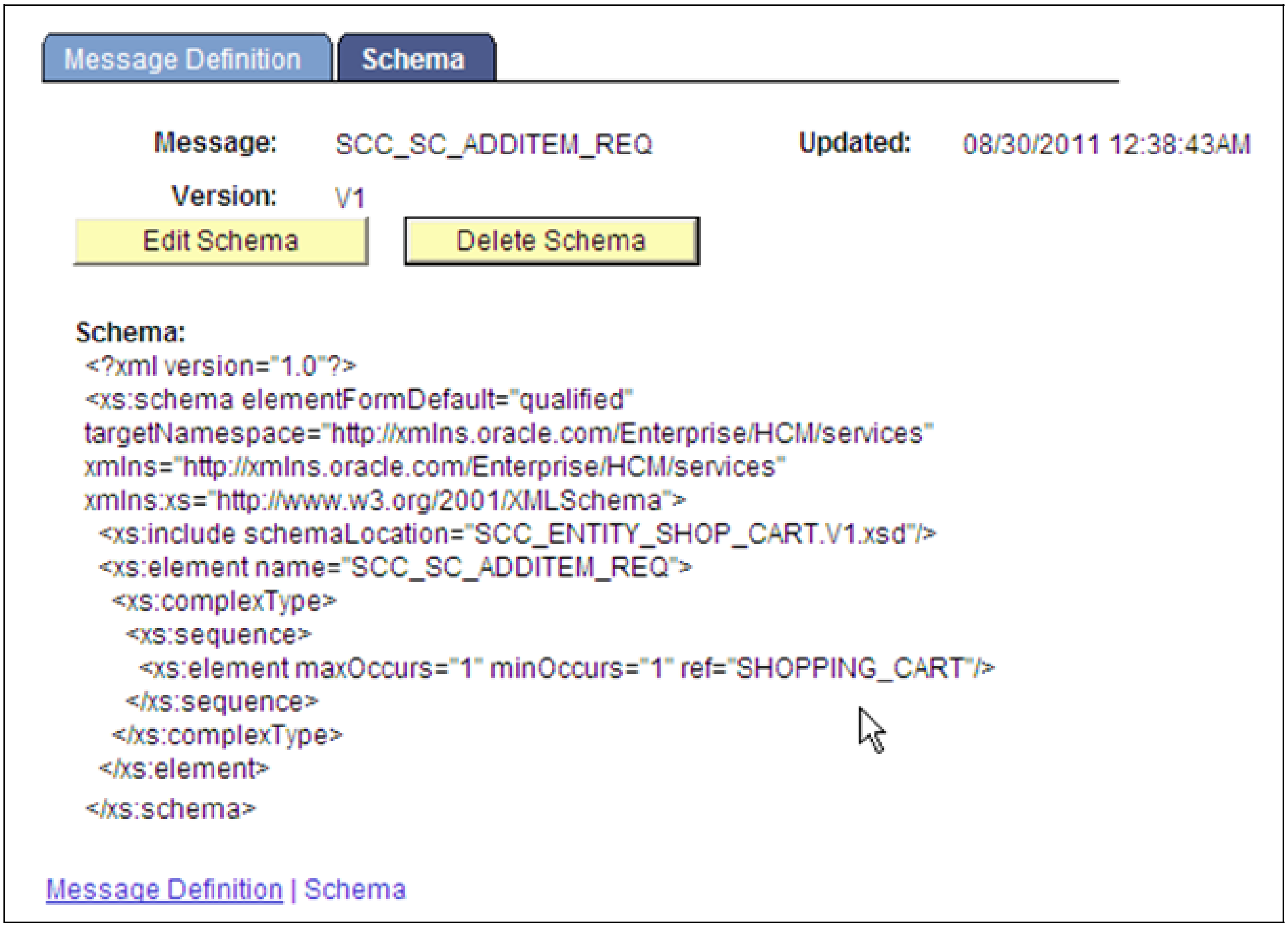


Example of a common schema for Enrollment and Student Financials shopping carts

Note that the XSD contains the Course Shopping Cart (COURSE_SHOP_CART) entity as well as the Student Financials Shopping Cart (SF_SHOP_CART) entity, each entity pointing to its appropriate items.

Note. When creating a new shopping cart, generating the XSD for the newly-created parent entity and then updating the SCC_ENTITY_SHOP_CART.xsd with this newly-created XSD has no impact on the existing shopping carts.

The following is the request XSD of generic SCC_SC_ADDITEM_REQ.xsd.



Example of a Schema page for SCC_SC_ADDITEM_REQ.xsd

Note that this SCC_SC_ADDITEM_REQ.xsd schema includes the SCC_ENTITY_SHOP_CART.xsd schema that you generated for the CourseShoppingCart entity.

Chapter 31

Searching for Records and Using Search/Match

This chapter provides overviews of the difference between search box search and Search/Match, search box searches, Search/Match searches, and discusses how to use Search/Match.

Understanding the Difference Between Search Box Search and Search/Match

The difference between record search from search dialog pages and using Search/Match is this: You use search box pages to retrieve existing records using limited search criteria to view or update data, and you use Search/Match to use a larger set of search criteria that detect duplicate or multiple records in your database or to identify different records that contain duplicate data that should uniquely identify only one ID.

Maintaining the integrity of IDs and their associated data is important toward maximizing system features and functionality. Search/Match helps you to prevent the entry of duplicate or multiple records by determining whether a person (EMPLID), an organization (EXT_ORG_ID, if you license PeopleSoft Campus Solutions) or an applicant (HRS_PERSON_ID, if you license PeopleSoft HRMS Talent Acquisition Manager) already exists in your database before creating (or recreating) the record.

You use Search/Match to define rules and search parameters that determine if duplicate or multiple records exist with the uniquely identifying data relevant to your business processes. You can configure which results fields to display with the returned matching IDs. You can also choose to fully display, mask, or partially mask result field values based on business processes and the level of security that your users need.

You can reinforce the evaluation of possible duplicates by setting up Search/Match to run automatically at save time when a user creates a new ID.

Understanding Search Box Searches

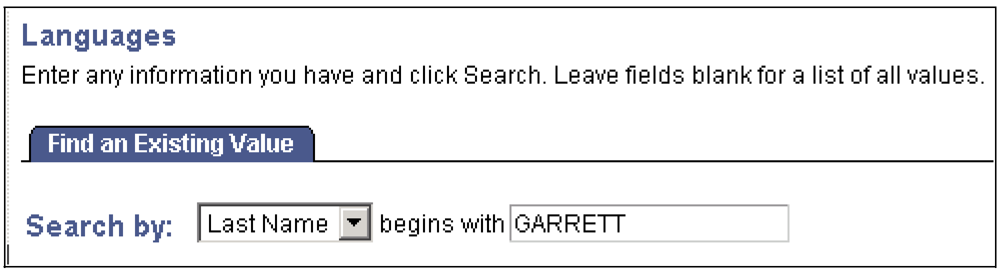
To view or update data on an existing record, select the menu item for the type of data to view and enter key criteria on the related search box page. Person ID (or just ID) is often the default key criteria. If you enter nothing and click OK, the system searches for all records with IDs, However, because all records have IDs, the list is much too large for the system to display at one time. You must enter some of the characters of the ID, or any of the other key criteria.

For example, you might want to determine which languages Bernice Smith speaks proficiently enough to translate. You would select Campus Community, Personal Information, Biographical, Personal Attributes, Languages. A search box page appears with a list of the search options for people, including: ID, campus ID, national ID, first name and last name. (Different or additional search criteria might appear depending on the type of data associated with the menu item that you select, or if you are searching for records for organizations.)

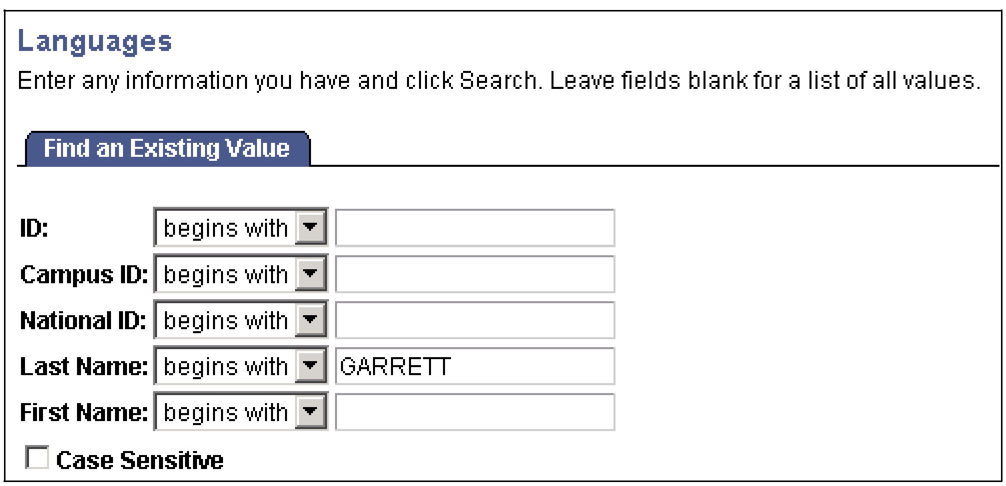
To narrow your search and minimize the system's record retrieval time, enter either the individual's unique ID or the national ID. If you do not know either of these, enter any of the criteria that you know. For example, you could select the Last Name option and enter *Smith.*

The system searches for and retrieves all records containing the data that you enter. It lists the resulting records in rows at the bottom of the page. Select the row with the specific data that you require. For example, if you enter only *Smith* in the Last Name field, rows for all individuals with the last name of *Smith* are listed in the search results. You would select the row with the first name *Bernice.*

If you want to search on more fields or want to search on all of the data that you know about an individual to control the search, you can click Advanced Search and enter that data.



Entering criteria on a search box page in Basic Search mode



Entering criteria on a search box page in Advanced Search mode

Search Results

View All First 1-5 of 5 Last

ID	Name	Gender	Date of Birth	Campus ID	National ID	National ID Country	NID Short Description	Last Name	First Name
FADLCD0020	Garrett,Linda A	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	LINDA
FAPK0140	Garrett,Angel P	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	ANGEL
HXSHPM14	Garrett,Suzanne	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	SUZANNE
SF0003	Garrett,Andrew	Male	**/**/****	(blank)	*********	USA	SSN	GARRETT	ANDREW
SFTC00303	Garrett,Linda	Female	**/**/****	(blank)	*********	USA	SSN	GARRETT	LINDA

Viewing search box search results from Basic Search or Advanced Search modes

The values for theDate of Birth and National ID fields in the sample page are masked. You can choose to mask, partially mask, or fully display result field values using demographic data access (DDA) security.

Understanding Search/Match

Search/Match enables you to define search parameters that administrative users can use to determine whether a potential duplicate ID exists in the database.

Using Search/Match

This section provides an overview of Search/Match, lists prerequisites, and discusses how to:

- Select criteria for a search.
- View search results.
- Determine relations with an institution.

Prerequisites

Before you can use Search/Match, you must set up Search/Match.

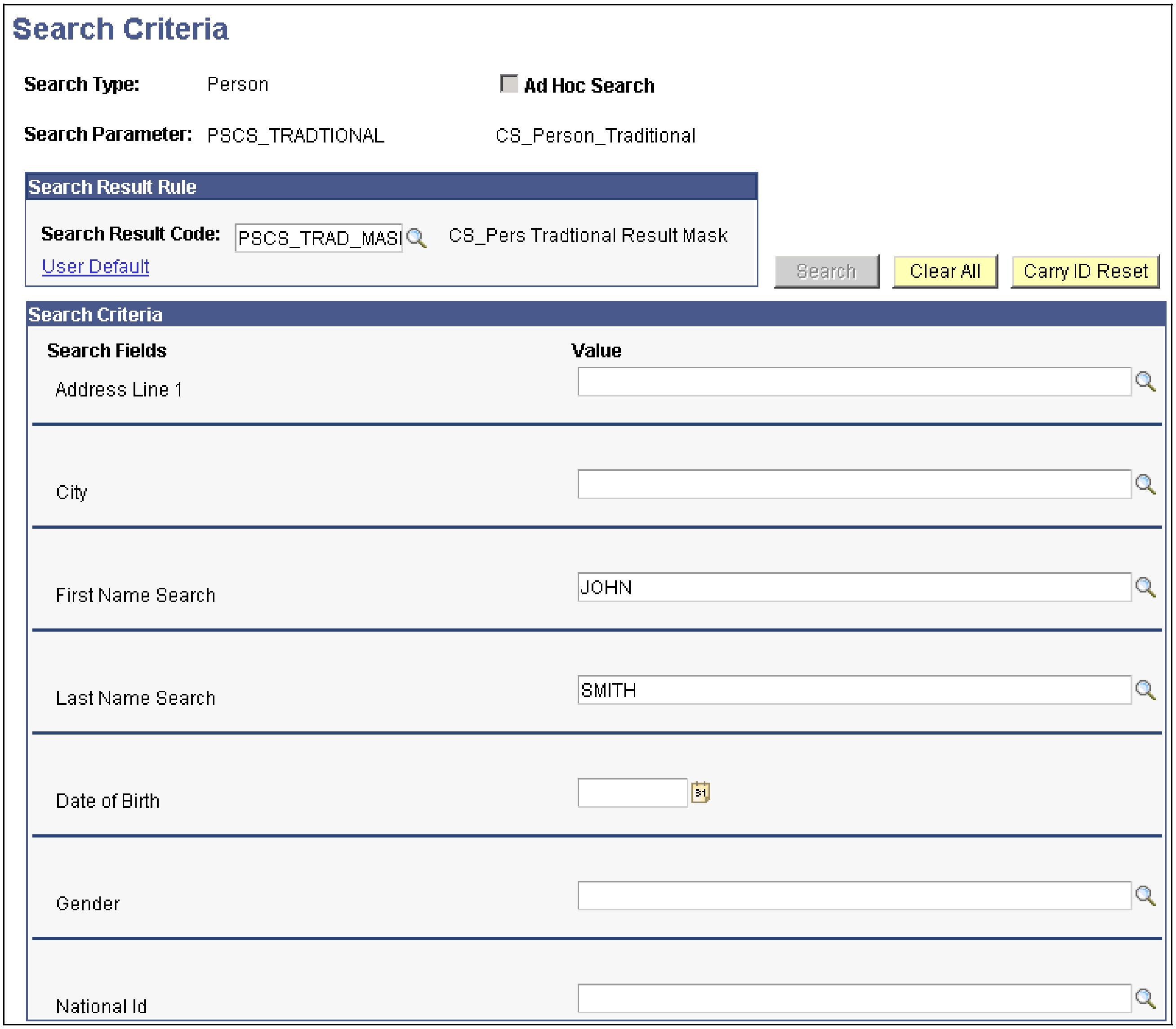
Pages Used for Search/Match

Page Name	*Definition Name*	*Navigation*	*Usage*
Search Criteria	HCR_SM_SEARCH	• Campus Community, Personal Information, Search/Match, Search Criteria • Campus Community, SEVIS, Search Tools, Search/Match, Search Criteria • Campus Community, Organization, Search for Organization, Search Criteria • Set Up SACR, System Administration, Utilities, Search/Match, Search/Match, Search Criteria • Student Admissions, Application Entry, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.
Search Criteria (continued)	HCR_SM_SEARCH	• Student Admissions, Application/Transcript Loads, Search/Match, Search Criteria • Student Admissions, External Test Score Processing, Search/Match, Search Criteria • Student Recruiting, Maintain Prospects, Search/Match, Search Criteria • Student Recruiting, Student Recruiters, Search/Match, Search Criteria • Student Recruiting, External Test Score Processing, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.

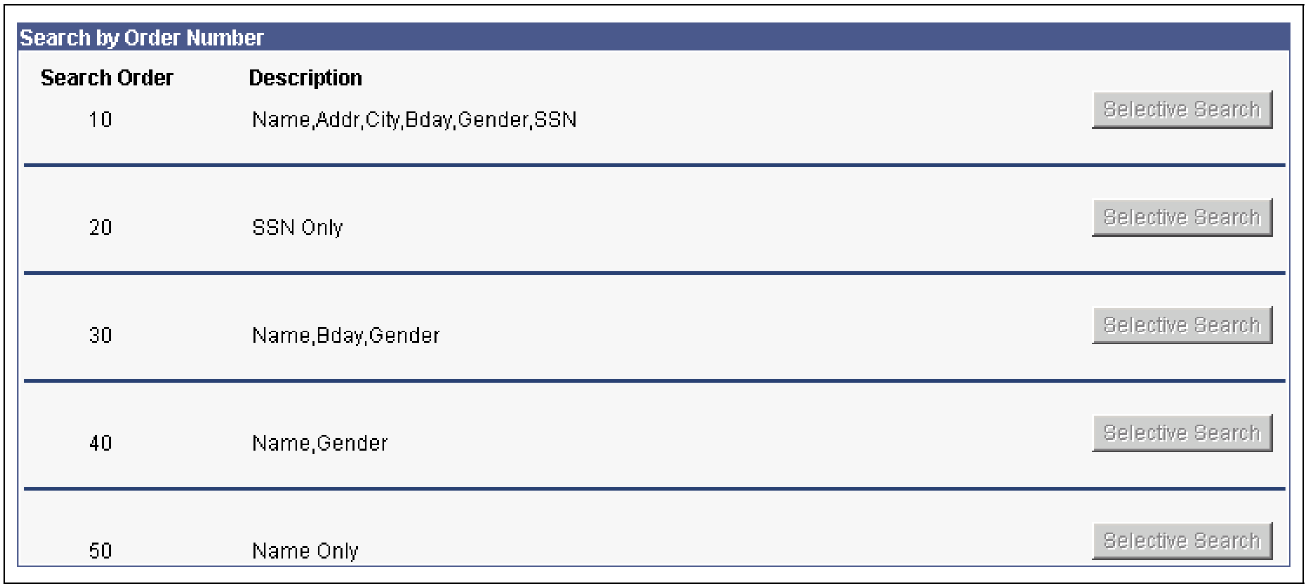
Page Name	***Definition Name***	***Navigation***	***Usage***
Search Criteria (continued)	HCR_SM_SEARCH	• Contributor Relations, Constituent Information, Organizations, Search for Organization, Search Criteria • Contributor Relations, Constituent Information, People, Search/Match, Search Criteria	Enter criteria to search for duplicate or multiple records.
Default Search Result	HCR_SM_USERDFLT	Click the User Default link on the Search Criteria page	Assign a search result code for the user ID to use as a default value for a specific search type.
Search Results	HCR_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of a manual search and investigate potential duplicate IDs. **Note.** Do not confuse this page with the Search Results setup page that has a similar object name (HCR_SM_RESULT) and on which you define search result fields.
Relations With Institution Detail	SEARCH_MATCH_SEC	Click theRelations With Institution link on the Search Results page.	Determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Selecting Criteria for a Search

Access the Search Criteria page (Campus Community, Personal Information, Search/Match, Search Criteria).



Search Criteria page (1 of 2)



Search Criteria page (2 of 2)

Search Type

The system displays the search type *(Person* or *Organization)* selected to access the page. If you have licensed PeopleSoft HRMS Talent Acquisition Manager, you could have selected *Applicant.*

Search Parameter

Displays the parameter code selected to access the page. The search parameter prompt on the search dialog page allows you to select only the search parameters to which your security roles permit you access.

Depending on your responsibilities, you might need to access the Search/Match page several times a day. If you use the same search parameter frequently, you can save it prior to accessing the Search/Match page by clicking the Save Search Criteria link on the search dialog page. Then, in the future, you can select it from the Use Saved Search prompt.

Ad Hoc Search

The system selects this to indicate that the Search Parameter code is set to perform a custom ad hoc search.

An ad hoc search enables you to bypass the institution's predefined search standards to perform a custom search without predefined operands and without limiting the characters to evaluate. For example, an ad hoc search might be *first name equals John,* whereas, a non-ad hoc search might be set to search only on the first three characters of the first name (in this case, *Joh*).

For an ad hoc search, the Search Criteria page displays the Search fields set up inside the search parameter code that you selected; and an Operand field appears for each search field. The Operand field enables you to perform a search that begins with, contains, or equals the search value that you enter.

Also, for ad hoc searches, the Search by Order Number area of the page does not apply and therefore does not appear.

Search Result Rule

Search Result Code

Select the search result code to use for displaying the results of this search. The search result code contains all of the information regarding how to display the IDs retrieved by Search/Match and what data to return to help you quickly determine whether an ID already exists for the constituent for which you are looking.

User Default

Click to access the Default Search Result page where you can select a search result code to use as a default value for this search type.

The system permits one default search result code per search type for each user ID.

Carry ID Reset

Click to reset a carried ID to *New.*

On the Search Results page, you can select to carry an ID as you access pages to further investigate a potential duplicate. When you click Carry ID Reset, the system stops carrying the selected ID and uses an ID of *New* instead. This is especially useful when you need to access pages that create new IDs.

Search Criteria

Search Fields

The system displays each of the search fields associated with the search parameter that you selected.

Operand

These fields appear only when the search parameter permits ad hoc searches. When the parameter permits ad hoc searches, the system selects the Ad Hoc Search check box and hides the Search by Order Number area of the page.

Select the operand to perform the search. The valid values are *Begins With, Contains,* and *Equals.* These values are delivered as translate values and should not be changed.

Value

For each search field that you specify, enter the value to search for. If predefined values are available (such as for gender), you can select from them from the prompt. If no predefined values exist, you can type the data directly into the value field.

Clear All

Click this button to clear all entries in the Value fields.

Search

Click this button to launch a search on all of the values that you entered and to retrieve results for the most restrictive search order number defined in the Search Parameter that you selected. When the search is complete, the system transfers you to the Search/Match Results page.

Note. When you click Search, the system searches only for the data specified. It filters the search orders that are defined for the Search Parameter that you selected. For example, if Search/Match finds at least one potential matching ID at search order number 10, it will stop the search and display the results obtained at search order number 10. If no potential matching IDs are found, the search continues to the next search order number, and so on. If you want to search using a specific Search Order number, use the Selective Search button for that order number.

Search by Order Number

This area of the page appears only if the Ad Hoc Search box is not selected.

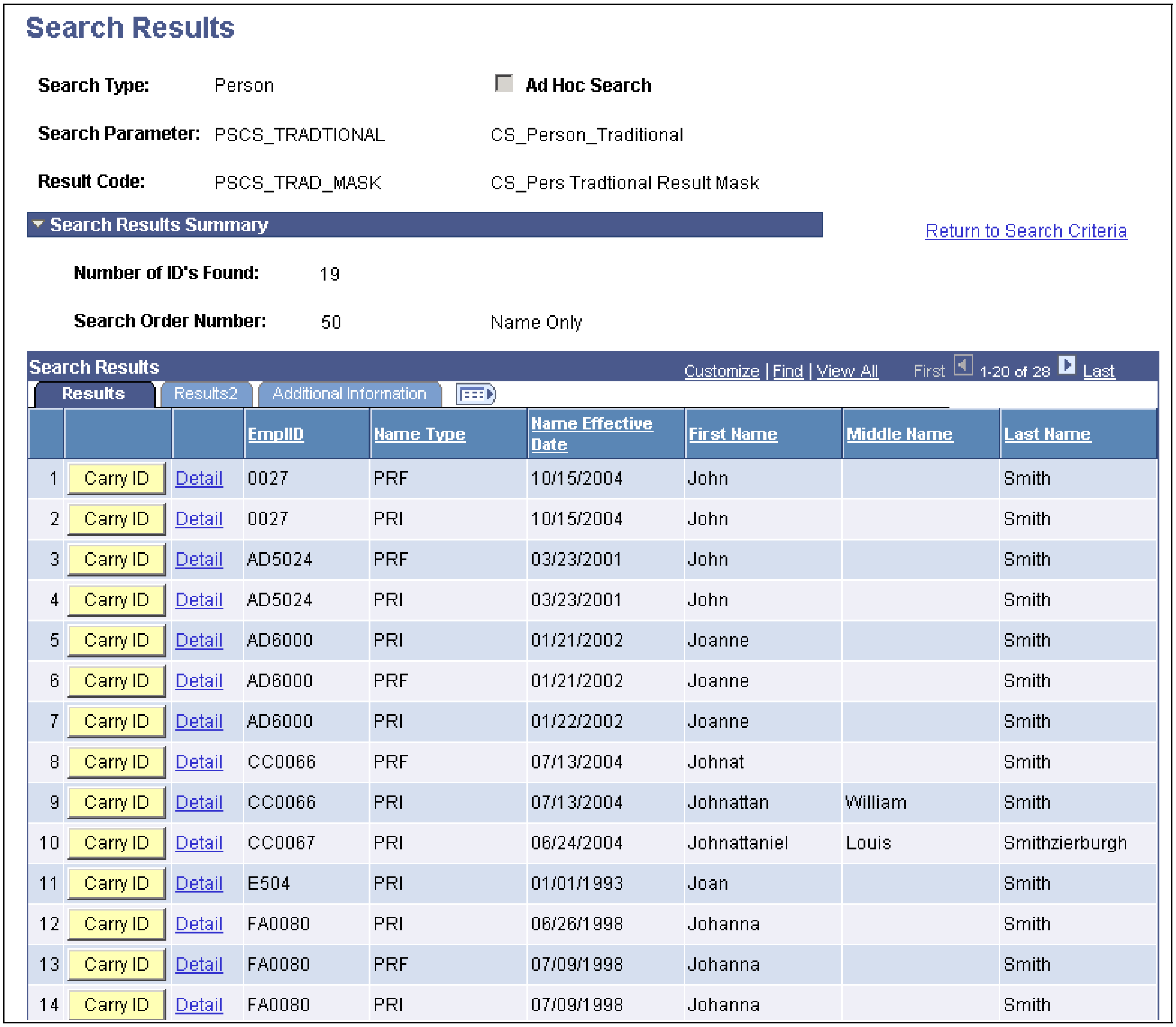
When you enter criteria in the Value fields, the Selective Search button for the search order defined with the fields becomes available.

Click the Selective Search button to conduct specific searches.

When the search is complete, the system transfers you to the Search Results page.

Viewing Search Results

Access the Search Results page (enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search).



Search Results

Search Type: Person
Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL CS_Person_Traditional

Result Code: PSCS_TRAD_MASK CS_Pers Tradtional Result Mask

Search Results Summary

Return to Search Criteria

Number of ID's Found: 19

Search Order Number: 50 Name Only

Search Results Customize | Find | View All First 1-20 of 28 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith
3	Carry ID	Detail	AD5024	PRF	03/23/2001	John		Smith
4	Carry ID	Detail	AD5024	PRI	03/23/2001	John		Smith
5	Carry ID	Detail	AD6000	PRI	01/21/2002	Joanne		Smith
6	Carry ID	Detail	AD6000	PRF	01/21/2002	Joanne		Smith
7	Carry ID	Detail	AD6000	PRI	01/22/2002	Joanne		Smith
8	Carry ID	Detail	CC0066	PRF	07/13/2004	Johnat		Smith
9	Carry ID	Detail	CC0066	PRI	07/13/2004	Johnattan	William	Smith
10	Carry ID	Detail	CC0067	PRI	06/24/2004	Johnattaniel	Louis	Smithzierburgh
11	Carry ID	Detail	E504	PRI	01/01/1993	Joan		Smith
12	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
13	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
14	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith

Search Results page for a manual search

Search Results | Customize | Find | View All | First 1-7 of 7 Last

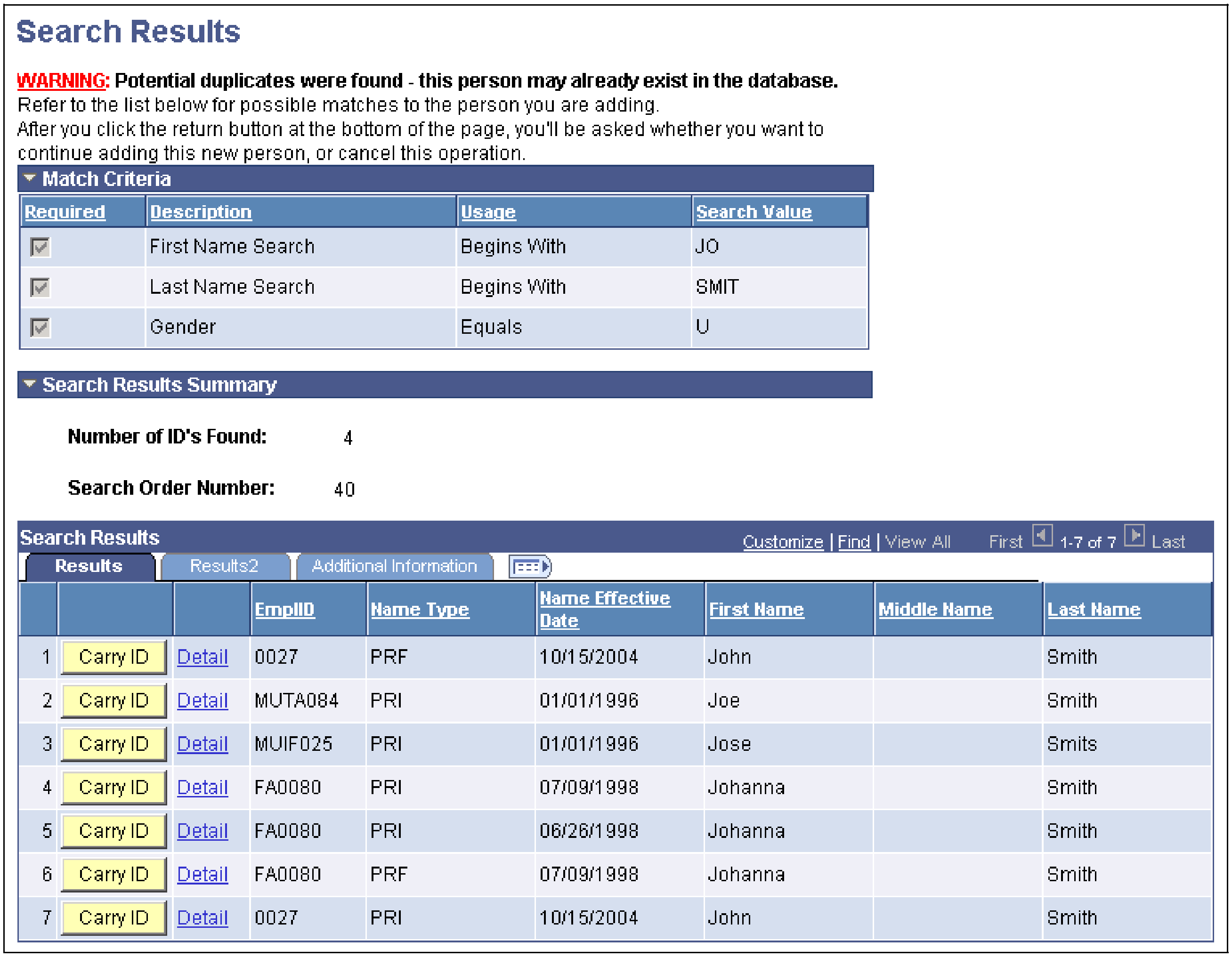
Results | Results2 | Additional Information

			EmplID		
1	Carry ID	Detail	0027	Person Organizational Summary	Relations With Institution
2	Carry ID	Detail	MUTA084	Person Organizational Summary	Relations With Institution
3	Carry ID	Detail	MUIF025	Person Organizational Summary	Relations With Institution
4	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
5	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
6	Carry ID	Detail	FA0080	Person Organizational Summary	Relations With Institution
7	Carry ID	Detail	0027	Person Organizational Summary	Relations With Institution

Search Results page, Additional Information tab (for an automatic search)

When you enter criteria on the Search Criteria page and click Search or any of the search by order number Selective Search buttons, the system launches the search and transfers you to the Search Results page with the results displayed as shown in the sample page above.

For an automatic search, the Search Results page is displayed as shown in the sample page below. That is, if Search/Match is set to launch automatically with both the search parameter permission and search result permission configured with a component name that allows the creation of IDs. When you try to add an ID on a component that is set up that way and at save time, Search/Match detects potential duplicates, the Search Results page displays a warning message indicating that at least one potential ID in the database matched the data that was entered to create the ID.



Search Results

WARNING: Potential duplicates were found - this person may already exist in the database.
Refer to the list below for possible matches to the person you are adding.
After you click the return button at the bottom of the page, you'll be asked whether you want to continue adding this new person, or cancel this operation.

Match Criteria

Required	Description	Usage	Search Value
☑	First Name Search	Begins With	JO
☑	Last Name Search	Begins With	SMIT
☑	Gender	Equals	U

Search Results Summary

Number of ID's Found: 4

Search Order Number: 40

Search Results — Customize | Find | View All — First 1-7 of 7 Last

Results | Results2 | Additional Information

			EmplID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	0027	PRF	10/15/2004	John		Smith
2	Carry ID	Detail	MUTA084	PRI	01/01/1996	Joe		Smith
3	Carry ID	Detail	MUIF025	PRI	01/01/1996	Jose		Smits
4	Carry ID	Detail	FA0080	PRI	07/09/1998	Johanna		Smith
5	Carry ID	Detail	FA0080	PRI	06/26/1998	Johanna		Smith
6	Carry ID	Detail	FA0080	PRF	07/09/1998	Johanna		Smith
7	Carry ID	Detail	0027	PRI	10/15/2004	John		Smith

Search Results page, Results tab (automatic search)

On either version of the Search Results page, you can view the list of results returned by the search, view the details of any record returned in the search, and click Carry ID to have the system carry the ID forward as you subsequently access pages for further investigation.

Search Results Summary

Number of ID's Found

Displays the number of IDs that met the search criteria.

This number may be smaller than the number of rows returned in the Search Results grid because the grid might include the same ID multiple times. If the name field is included in the search result code selected, the search returns rows for each name type and effective date that match the search criteria entered. If the national ID field is included in the search result code, the search returns rows for each national ID entered for the record matching the search criteria.

Search Order Number Indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. This number can be used as an indicator of how close the returned IDs match the criteria entered.

Search Results

Columns appear on the Results and Results 2 tabbed pages based on the search result code selected. Depending on the user's role security, some values in the columns might be masked, partially masked, or fully displayed.

Carry ID Click this button for the system to capture and carry the ID to the ID field of the search box on the pages that you subsequently access so that you do not need to remember the ID.

Detail The Detail link appears if the selected search result code was configured to provide the user with a link to a page for more information about an ID.

Search Results, Additional Information Tab

This tab appears only when the search type is *Person.*

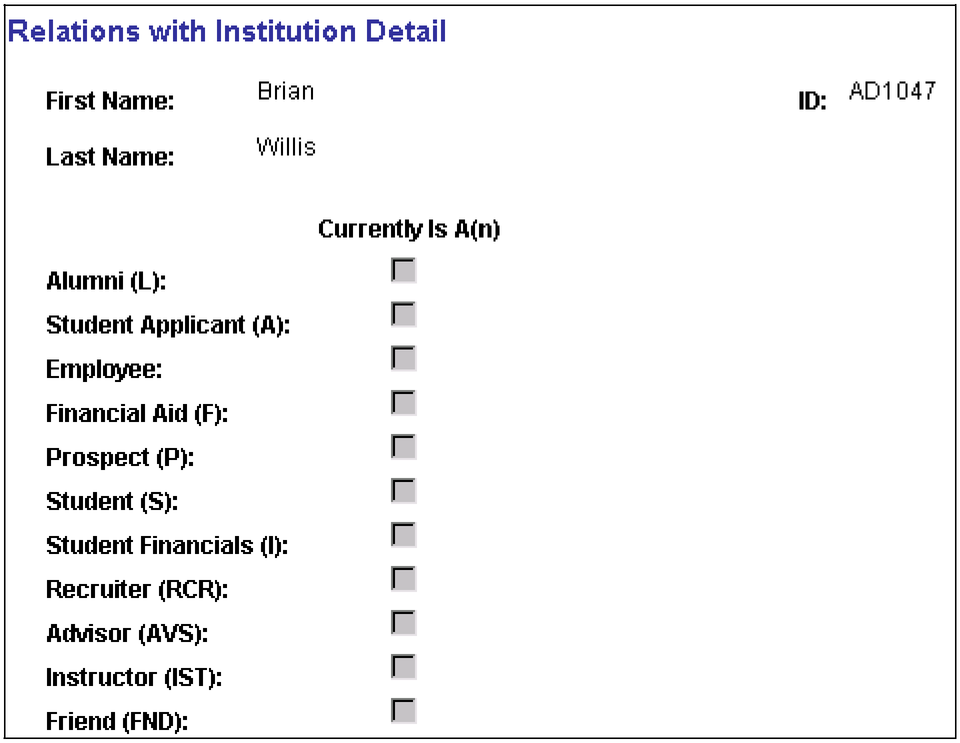
Person Organizational Summary Click to access the Person Organizational Summary page, on which you can review the status of this person of interest record.

Relations With Institution Click to access the Relations with Institution Detail page, on which you can determine the type of relations that the individual has with your institution and further clarify whether this is the individual for whom you are searching.

Note. The Relations With Institution link appears only if *Student Administration* or *Contributor Relations* is selected on the Installation Table (INSTALLATION_TB1) page.

Determining Relations with an Institution

Access the Relations with Institution Detail page (click the Relations With Institution link on the Search Results page).



Relations with Institution Detail page

Currently Is A(n)

When selected, indicates that the individual currently has the associated relation to your institution.

Note. PeopleSoft Contributor Relations uses the abbreviations on this page in its CR search.

Chapter 32

Working with Constituent Transaction Management

At the time of publication of this PeopleBook, the latest version of the Working with Constituent Transaction Management chapter is available on the following My Oracle Support page, as part of the Campus Community documentation package for Bundle 23:

CS 9.0 Bundle #23 Functional Documentation and Additional Features October 2011 [ID 1371376.1]

Chapter 33

Using External Search/Match

This chapter provides an overview of external search/match and discusses how to:

- Select criteria for an integrated search.
- View integrated search results.
- Conduct an automatic search.
- Understand external search/match web services.

Note. If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing how to configure and use External Search/Match directly between the two systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Understanding External Search/Match

As is the case for Internal Search/Match, there are two options to perform searches in an external system:

- Online search: Manually navigate to the Search/Match Integrated component and enter search options.

  Note. When your institution configures External Search/Match functionality and integrates with an external system, Oracle recommends that you revoke your users' security access to the Search/Match component and replace it with the Search/Match Integrated component so that users will use the same tool for searching existing IDs.

- Automatic search: From a Campus Solutions component where an ID can be created, the External Search/Match triggers behind the scenes after user clicks Save.

Selecting Criteria for an Integrated Search

This section discusses how to perform an integrated search.

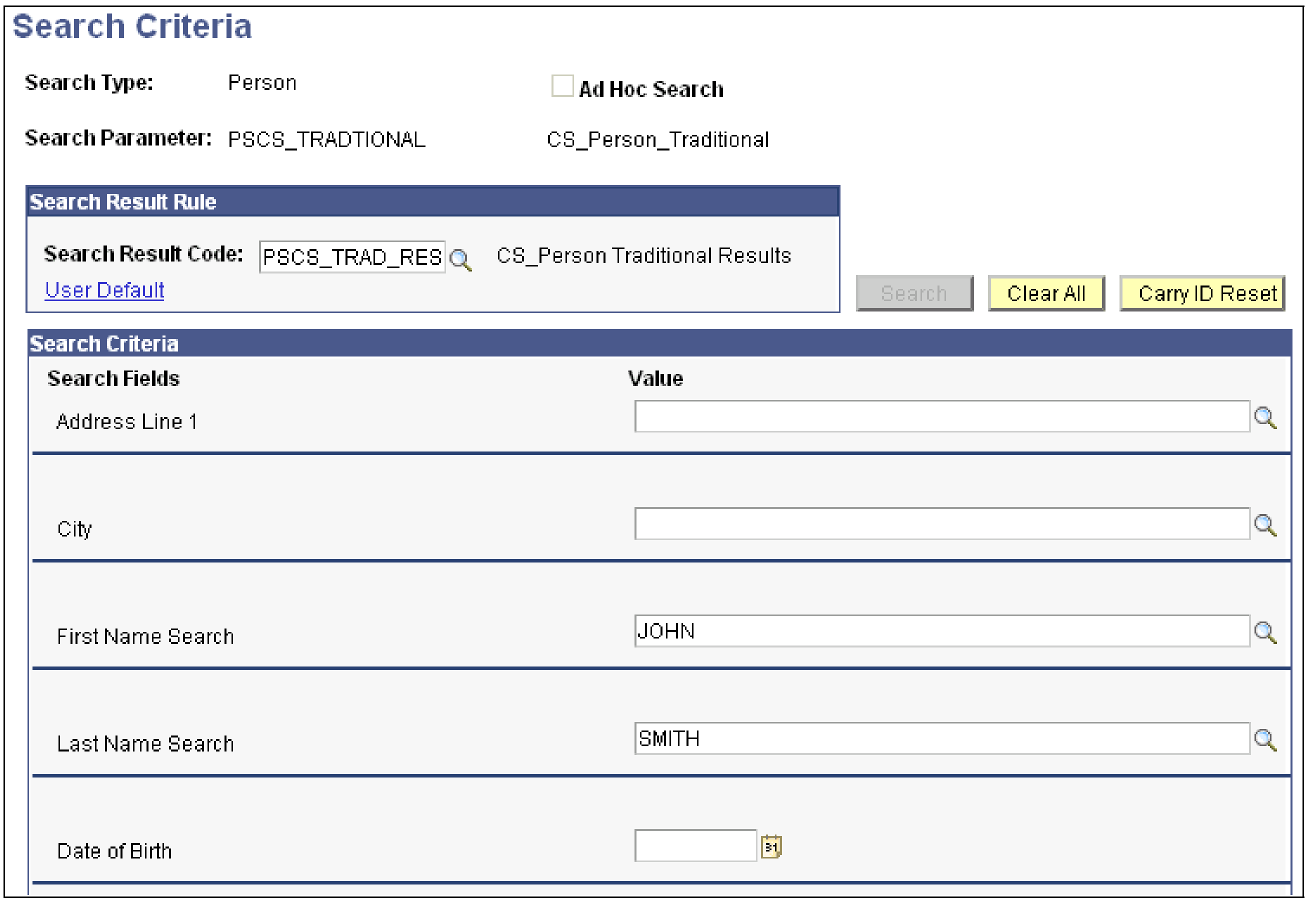
Page Used to Select Criteria for an Integrated Search

Page Name	Definition Name	Navigation	Usage
Search Criteria	HCR_SM_SEARCH	• Campus Community, Personal Information, Search/Match Integrated, Search Criteria • Campus Community, SEVIS, Search Tools, Search/Match Integrated, Search Criteria • Set Up SACR, System Administration, Utilities, Search/Match, Search/Match Integrated, Search Criteria • Student Admissions, Application Entry, Search/Match Integrated, Search Criteria • Student Admissions, Application/Transcript Loads, Search/Match Integrated, Search Criteria • Student Admissions, External Test Score Processing, Search/Match Integrated, Search Criteria • Student Recruiting, Maintain Prospects, Search/Match Integrated, Search Criteria • Student Recruiting, Student Recruiters, Search/Match Integrated, Search Criteria • Student Recruiting, External Test Score Processing, Search/Match Integrated, Search Criteria	Enter criteria to search for duplicate person or multiple person records contained inside an external system. When the page is accessed through the SCC_SM_SEARCH component, then the system performs the External Search/Match evaluation.

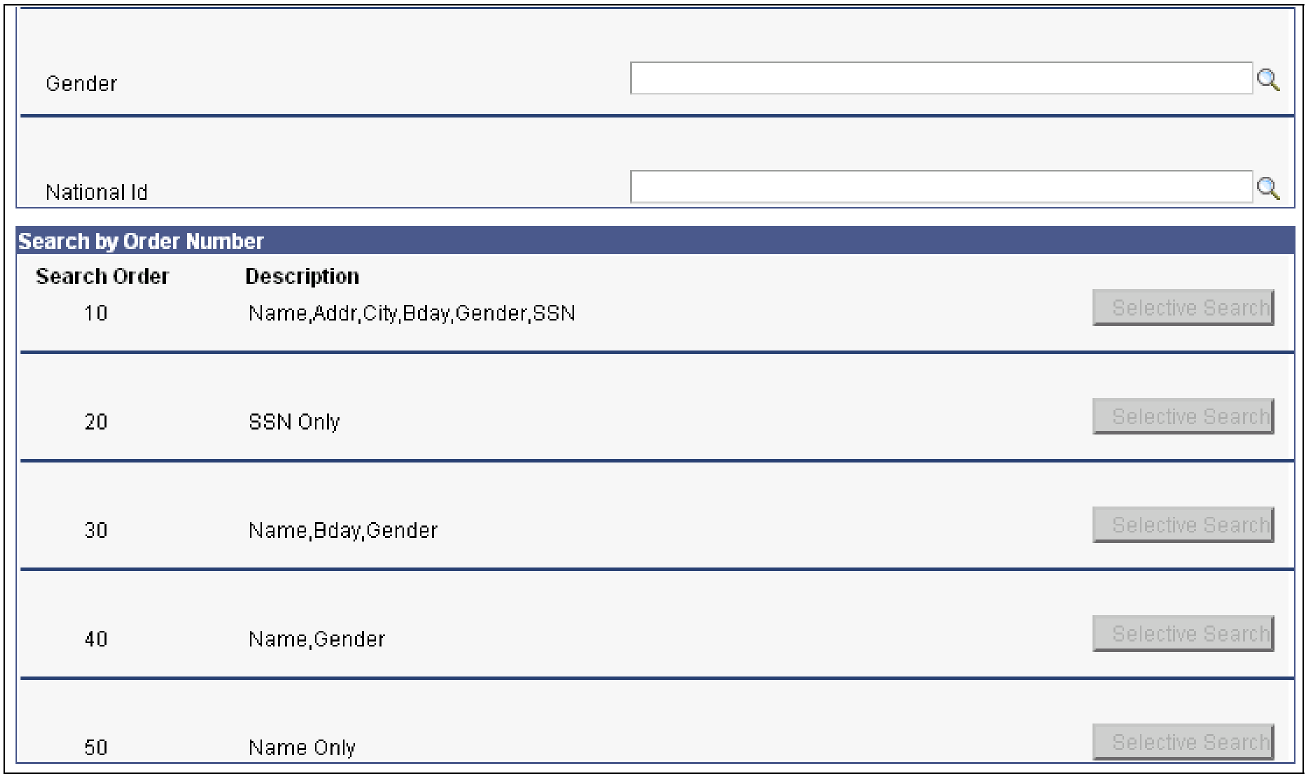
Page Name	Definition Name	Navigation	Usage
		• Contributor Relations, Constituent Information, People, Search/Match Integrated, Search Criteria	

Entering Search Criteria

Access the Search Criteria page (Campus Community, Personal Information, Search/Match Integrated).



Search Criteria page (1 of 2)



Search Criteria page (2 of 2)

The fields on this page are the same as those on the Search/Match page. However, the SCC_SM_SEARCH component includes logic that evaluates the external system data settings when you click the Search or Selective Search button. Note that this is only true when the Search Type is *Person.* For a Search Type of *Applicant* or *Organization*, the system triggers Search/Match.

Viewing Integrated Search Results

This section discusses how to:

- View search results.
- View biographic details.
- View regional details.

Pages Used to View Integrated Search Results

Page Name	*Definition Name*	*Navigation*	*Usage*
Integrated Search Results	SCC_SM_RESULTS	Enter criteria on the Search Criteria page and click Search or click one of the search by order number Selective Search buttons to launch a manual search.	View Search/Match results of an external system search and investigate potential duplicate IDs.
Biographic Details	SCC_SM_RESP_DTL	Click the Detail link on the Search Results page for a matching candidate that does not have an EmplID.	View personal data stored inside the external system.
Regional	SCC_BIO_DEMO_REG	Click the Detail link on the Integrated Search Results page, then Regional tab.	View regional data stored inside the external system.

Viewing Search Results

Access the Integrated Search Results page (Click the Search button or one of the available Selective Search buttons on the Search Criteria page). If the External Search/Match is triggered and the system has found matching candidates on a search rule number lower or equal to the Search/Match, the Integrated Search Results page appears.

Integrated Search Results

Search Type: Person ☐ Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

Search Results Summary

Return to Search Criteria

Number of ID's Found: 40

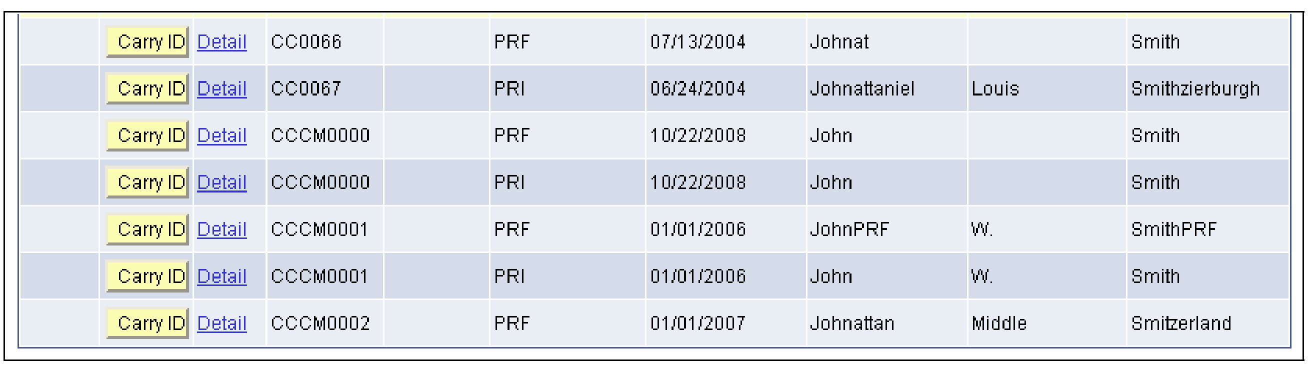
Search Order Number: 50 Name Only

Search Results Customize | Find | View All | First 1-20 of 74 Last

Results | Results2 | Additional Information

Score %			Emplid	HRMS Emplid	Name Type	Name Effective Date	First Name	Middle Name	Last Name
100	Import	Detail							
100	Import	Detail			PRF		John		Smith
100	Import	Detail							
100	Import	Detail							
100	Import	Detail							
97	Import	Detail			PRF		Johan	M	Smith
97	Import	Detail			PRF		JohnPRF	W.	SmithPRF
	Carry ID	Detail	AD5024		PRF	03/23/2001	John		Smith
	Carry ID	Detail	AD5024		PRI	03/23/2001	John		Smith
	Carry ID	Detail	AD6000		PRI	01/21/2002	Joanne		Smith
	Carry ID	Detail	AD6000		PRF	01/21/2002	Joanne		Smith
	Carry ID	Detail	AD6000		PRI	01/22/2002	Joanne		Smith
	Carry ID	Detail	CC0066		PRI	07/13/2004	Johnattan	William	Smith

Integrated Search Results page: Results tab (1 of 2)



	Carry ID	Detail	CC0066		PRF	07/13/2004	Johnat		Smith
	Carry ID	Detail	CC0067		PRI	06/24/2004	Johnattaniel	Louis	Smithzierburgh
	Carry ID	Detail	CCCM0000		PRF	10/22/2008	John		Smith
	Carry ID	Detail	CCCM0000		PRI	10/22/2008	John		Smith
	Carry ID	Detail	CCCM0001		PRF	01/01/2006	JohnPRF	W.	SmithPRF
	Carry ID	Detail	CCCM0001		PRI	01/01/2006	John	W.	Smith
	Carry ID	Detail	CCCM0002		PRF	01/01/2007	Johnattan	Middle	Smitzerland

Integrated Search Results page: Results tab (2 of 2)

Integrated Search Results

Search Type: Person

Ad Hoc Search

Search Parameter: PSCS_TRADTIONAL CS_Person_Traditional

Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

Search Results Summary

Return to Search Criteria

Number of ID's Found: 40

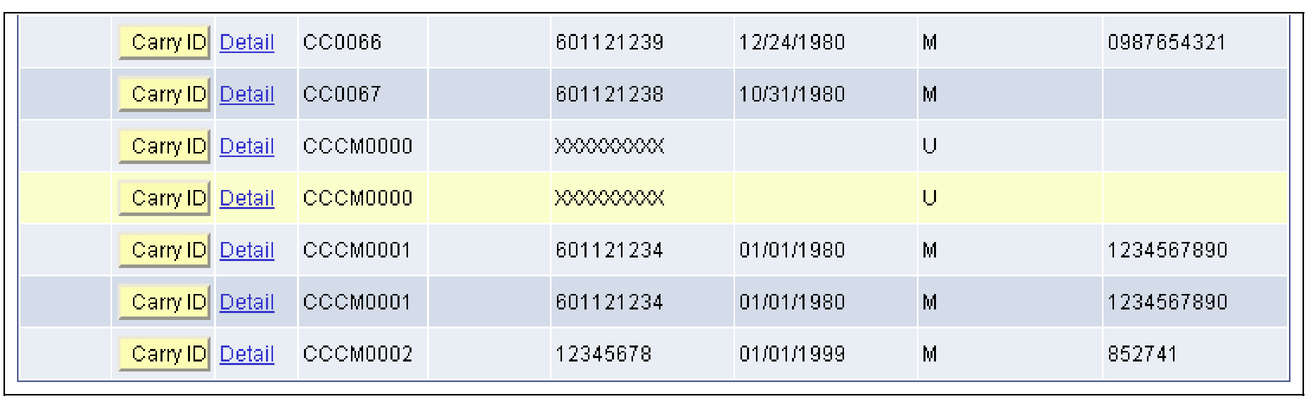
Search Order Number: 50 Name Only

Search Results Customize | Find | View All | First 1-20 of 74 Last

Results | Results2 | Additional Information

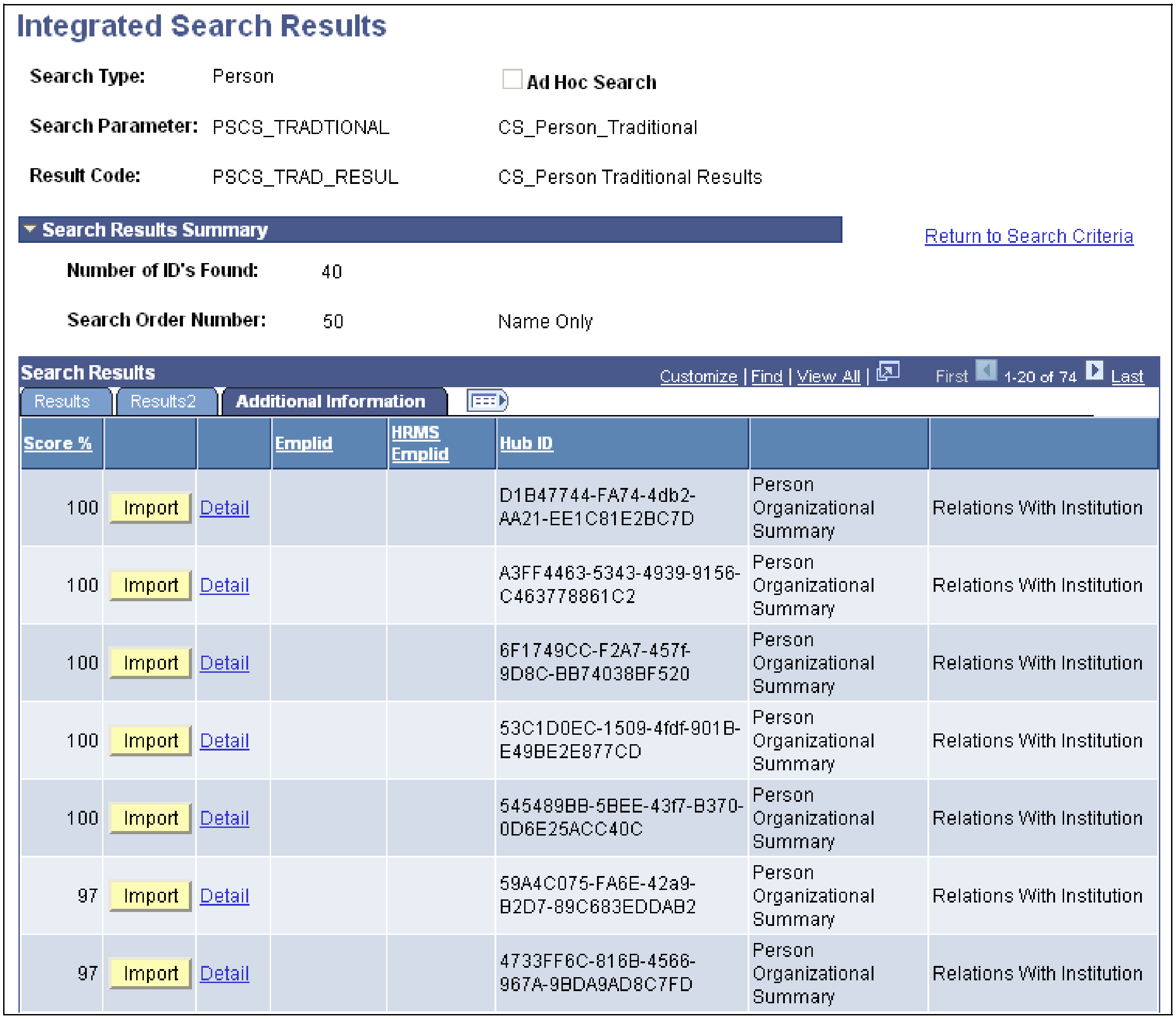
Score %			Emplid	HRMS Emplid	National ID	Date of Birth	Gender	Campus ID
100	Import	Detail						
100	Import	Detail						
100	Import	Detail						
100	Import	Detail						
100	Import	Detail						
97	Import	Detail			944444444	06/24/1982	M	
97	Import	Detail				01/01/1980	M	
	Carry ID	Detail	AD5024		601121234	01/01/1980	M	1234567890
	Carry ID	Detail	AD5024		601121234	01/01/1980	M	1234567890
	Carry ID	Detail	AD6000		XXXXXXXXX		F	
	Carry ID	Detail	AD6000		XXXXXXXXX		F	
	Carry ID	Detail	AD6000		XXXXXXXXX		F	
	Carry ID	Detail	CC0066		601121239	12/24/1980	M	0987654321

Integrated Search Results page: Results2 tab (1 of 2)



	Carry ID	Detail	CC0066		601121239	12/24/1980	M	0987654321
	Carry ID	Detail	CC0067		601121238	10/31/1980	M	
	Carry ID	Detail	CCCM0000		XXXXXXXXX		U	
	Carry ID	Detail	CCCM0000		XXXXXXXXX		U	
	Carry ID	Detail	CCCM0001		601121234	01/01/1980	M	1234567890
	Carry ID	Detail	CCCM0001		601121234	01/01/1980	M	1234567890
	Carry ID	Detail	CCCM0002		12345678	01/01/1999	M	852741

Integrated Search Results page: Results2 tab (2 of 2)



Integrated Search Results page: Additional Information tab (1 of 2)

	Carry ID	Detail	AD5024			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	AD5024			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	AD6000			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	AD6000			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	AD6000			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CC0066			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CC0066			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CC0067			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CCCM0000			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CCCM0000			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CCCM0001			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CCCM0001			Person Organizational Summary	Relations With Institution
	Carry ID	Detail	CCCM0002			Person Organizational Summary	Relations With Institution

Integrated Search Results page: Additional Information tab (2 of 2)

Many fields on this page are the same as those on the Search Results page. However, there are some important distinctions:

- Records with no EmplIDs appear first in the Search Results group box.
- Records with no EmplIDs are assigned an External Sys ID.
- Records with no EmplIDs, that are importing EmplIDs from an external system, are assigned an External Sys ID and display the External Employee ID.
- Where an EmplID exists, the Detail link leads to a page where you can view details of the ID record from the CS system.
- Where no EmplID exists, the Detail link leads to a page where you can view details of the data from the external system.
- The Import button appears when a person meets the criteria in the external system.

- The Score % and Universal ID columns appear based on settings defined on the External System Search Match Options page.
- Masking configuration is in effect for all matching constituents, even those with no EmplID.
- For matching constituent records found by External Search/Match, this page displays information that is not necessarily stored inside the external system (for example, Aid Year).

Number of ID's Found	The system displays the total number of distinct IDs returned by both Search/Match and External Search/Match, just Search/Match, or just External Search/Match.
Search Order Number	The system shows the Search Order Number where results were found. When the internal and external searches find results under different search rules, the Results Engine evaluates the Search Order Number returned by both searches and displays the results for the search that found results under the smallest search order number (the most restrictive search). When the internal and external searches find results under the same search rule, the Results Engine displays them both.

Search Results

The fields in this group box are similar to those on the Search Results page. The system displays the results returned from both the CS database and the external system, along with additional data to describe the IDs retuned. However, the columns are dynamic and they can refer to personal data info or transaction data info. Define static columns to appear here on the External System Search Match Options page.

Score %	The system displays a percentage or a number to weight the matching candidate. If the external system calculates a score and sends it with the matching candidates, the score value is returned from the external system with each ID, to indicate the relevance of the ID found. (You can customize the column label on the External System Search Match Options page.)

Carry ID and **Import**

The Carry ID button appears when an EmplID exists; otherwise the system displays the Import button. Security access to the Add/Update Person component controls whether users can use the Import button.

Click the Import button to import external system data when the person does not exist in the CS system (there is no CS EmplID associated with the person). When you click the button, the system displays a message asking if you want to create the new ID in the system.

If you click *Yes,* the system performs a Fetch Request to request the complete constituent record from the external system. When the system receives the Fetch Response from the external system, it uses the personal data in it to create a new EmplID.

After successfully importing the data, the Search Results group box refreshes and the newly created EmplID appears; the Import button for the person row changes to Carry ID. Notice that no other import can be performed (all the Import buttons are then grayed out). This is to prevent the user from importing multiple matching candidates.

If you click *No,* the system does not import any data and returns to the Integrated Search Results page.

If the system is configured on the External Core Data Integration page where the external system selected is the *Higher Ed Constituent Hub,* and the option to Import External Emplid is selected, if the person in the Higher Ed Constituent Hub contains am EmplID from the spoke system, the value of the EmplID will be imported and used to create the person in the CS system.

After successfully importing the data, the Search Results group box refreshes and the Imported EmplID appears; the Import button for the person row changes to Carry ID. Notice that no other import can be performed (all the Import buttons are then grayed out). This is to prevent the user from importing multiple matching candidates.

Detail

If no EmplID exists for the person, click this link to invoke a Fetch Request to retrieve the complete constituent record from the external system. When the system receives the Fetch Response from the external system, it displays the personal data in the response on the Biographical Details page.

Note. Both the Import button and the Detail link (when no EmplID exists) trigger the same Fetch Request. The data received inside the Fetch Response will only be saved to your database when the Fetch request is triggered from the Import button. It is therefore good practice to always review the detailed information prior to import.

If an EmplID exists, click this link to access the page set up inside the Search Results Code used to view more information about the person.

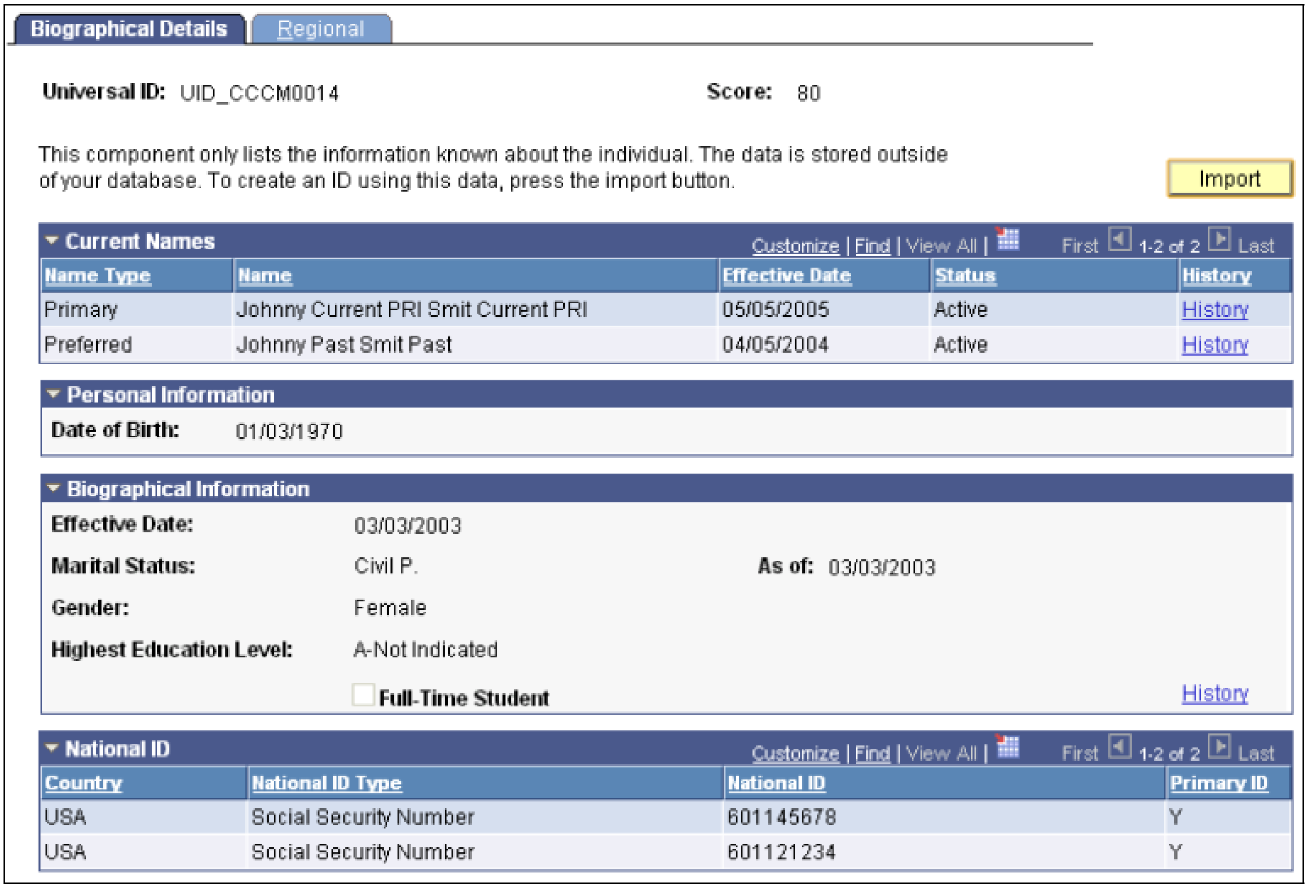
If a user has access to the page set up inside the Search Results Code used, he also has access to the Integrated Details page. Else, user cannot preview the information.

Additional Information

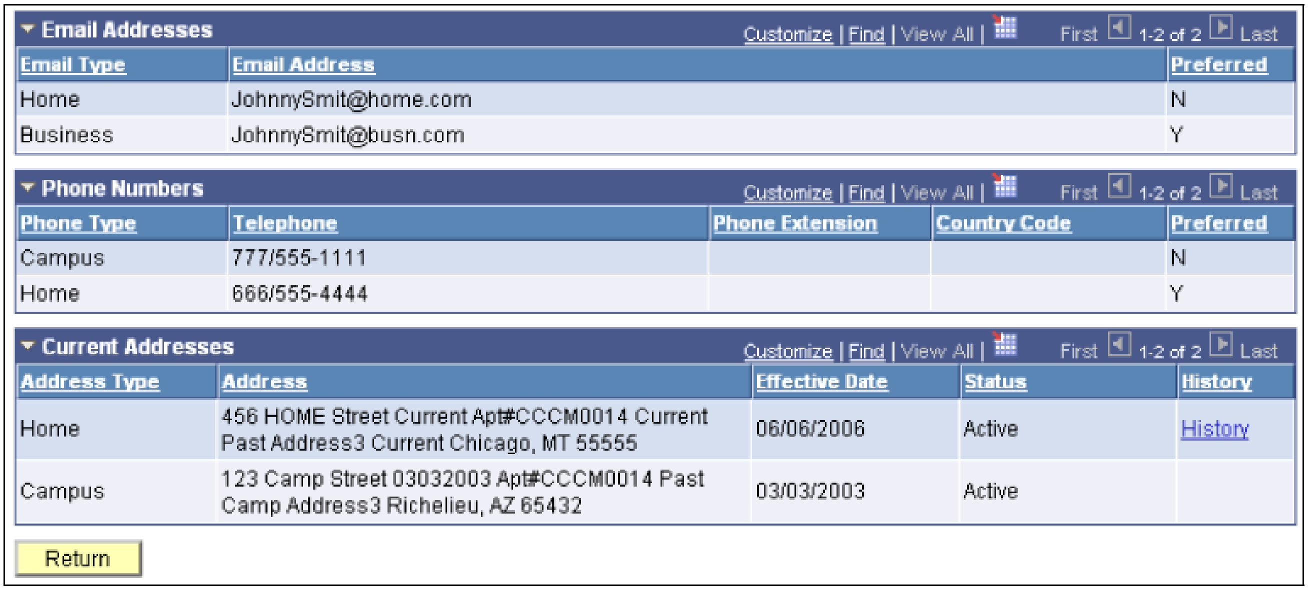
The Universal ID column appears here, when selected as a static field on the External System Search Match Options page.

Viewing Biographical Details

Access the Biographic Details page (click the Detail link on the Integrated Search Results page).



Biographical Details page (1 of 2)



Biographical Details page (2 of 2)

This page displays sections of data that are not actually stored in the CS database until you click the Import button.

The system displays messages on this page based on the following conditions:

Note. Where no data exists, the system hides the fields and displays a message in the Missing Information group box.

Data Region	***Condition***	***Message***
Current Names	No name information exists	No Current Name Information
Personal Information	No personal information exists	No Personal Information
Biographical Information	No biographical information exists	No Biographical Information
National ID	No national ID information exists	No National ID Information
Email Addresses	No email address information exists	No Email Addresses Information
Phone Numbers	No phone information exists	No Phone Number Information
Current Addresses	No address information exists	No Address Information
Regional	No regional data exists	No Regional Information

Import Click this button to import the Universal ID and all the information displayed into the CS system and create an EmplID.

Current Names

History

This link appears only if the Universal ID contains a past or future date in addition to the current row. Click the link to access the Name Type History page.

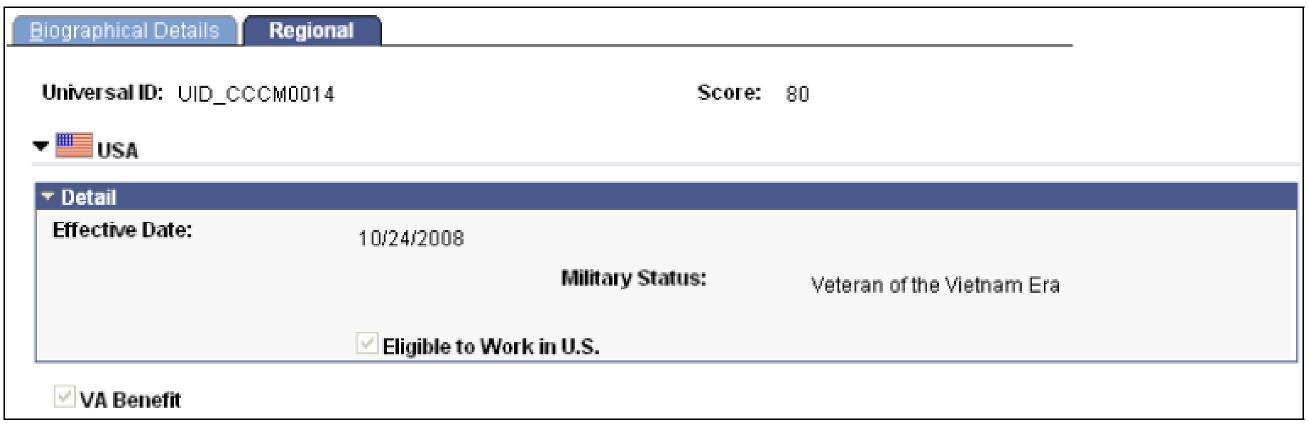
Current Addresses

History

This link appears only if the Universal ID contains a past or future date in addition to the current row. Click the link to access Address Type History page.

View Regional Details

Access the Regional page (click the Detail link on the Integrated Search Results page, then Regional tab).



Regional page

This page is available only if it contains data. If the Fetch Response contains no Regional information, this message appears on the Missing Information group box on the Biographical Details page.

Data Region	*Condition*	*Message*
Regional	No regional data exists	No Regional Information

Conducting an Automatic Search

The same XML messaging that is triggered when you use External Search/Match is integrated with other pages within Campus Solutions. On any page where you can add a new person, you trigger an automatic search to the external system when you click the Save button, if an external system is configured.

Understanding External Search/Match Web Services

This section discusses the delivered constituent web services that are triggered and used by External Search/Match functionality. Specifically, this section discusses these web services:

- Match service (SCC_SM_SERVICE).
- Fetch request and fetch response (SCC_SM_FETCH).

The *PeopleSoft Campus Solutions Constituent Web Services Developer's Guide* contains more technical details of these web services including examples of the XML message code.

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide on My Oracle Support https://support.oracle.com

Match Service

When you click the Search or Selective Search buttons on the Integrated Search Criteria page, the system conducts an Internal Search/Match, External Search/Match, or both. External Search/Match sends a Match Request to the external system. This is an XML message that contains all of the fields included in the search request. The external system returns a Match Response, also an XML message.

The Match Request XML message (SCC_SM_SERVICE_REQ.V1) to the external system exposes all information that the system has:

- All of the search order numbers that can potentially return matching candidates.
- Search fields.
- Search data.
- Search/Match configuration information.

The Match Response XML message (SCC_SM_SERVICE_RESP.V1) from the external system contains:

- Search order number/rule that found results.
- Matching candidates.
- Score.
- Universal ID/cross reference.
- Person data.
- External Employee ID when importing EmplIDs from external spoke system.

Fetch Request and Fetch Response

When you click the Detail or Import buttons on the Integrated Search Results page for a constituent without a CS EmplID, the system sends a Fetch Request to the external system. This is an XML message that requests the full constituent record from an external system. The external system returns a Fetch Response, also an XML message.

The Fetch Request XML message (SCC_SM_FETCH_REQ.V1) to the external system contains the universal ID for which the Import or Detail buttons were selected.

The Fetch Response XML message (SCC_SM_FETCH_RESP.V1) from the external system contains the full constituent record.

When you import a new person record fetched from an external system:

1. The CS system creates an EmplID.

   If the system is configured to import the EmplID from the HECH system, the CS system will use this EmplID when the person is created within CS.

2. The CS system populates the SCC_HUB_MAP table with the EmplID and its Universal ID.

3. The CS system publishes the PERSON_BASIC_SYNC message.

4. The CS system publishes an outbound constituent message (which includes the Universal ID).

5. Using the Universal ID, the external system updates the constituent's reference table with a new EmplID.

See Also

PeopleSoft Campus Solutions Constituent Web Services Developer's Guide on My Oracle Support https://support.oracle.com

Chapter 34

Adding a Person to Your Campus Solutions Database

To create records in your PeopleSoft Campus Solutions database, you add a person record or an organization record. This chapter discusses how to add person records for students and other nonpaid individuals. Use PeopleSoft Human Resources Management (HRMS) to enter records for employees and contingent workers.

This chapter provides and overview of ID assignment and discusses how to:

- Add an individual to your database.
- Add or update biographical details data.

Note. If you license PeopleSoft HRMS, you should read the HRMS Administer Workforce documentation for adding a person and become familiar with the difference and implications of adding records for employees, contingent workers, and persons of interest. Persons of interest are individuals who do not have or need a job record in your PeopleSoft database. Students are persons of interest.

If you are implementing separate instances of PeopleSoft Campus Solutions and PeopleSoft HCM, you should read the additional documentation describing those integrations. Certain items and business processes that are detailed in this PeopleBook may vary depending on how you configure your separated systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce,"Adding a Person in PeopleSoft Human Resources"

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Understanding System ID Assignment

When you open the Add a Person component, the system requests a person ID. You can assign IDs two ways:

- Automatically

  If you use automatic ID assignment, the system adds IDs sequentially as you add new people.

  The system maintains the last assigned ID on the Installation Table - Last ID Assigned page.

  See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,*"Setting Up and Installing PeopleSoft HRMS,"Setting Up Implementation Defaults

- Manually

  You enter the IDs, using any system that you choose for the organization. With manual entry, you don't need to assign IDs sequentially.

  Assigning IDs manually is the only way that you can include alphabetical characters in the IDs.

Note. To avoid maintaining two different sets of IDs, you should either always assign them manually or always let the system assign them.

Adding an Individual to Your Database

To add an individual to your system, you must create a personal information record for that individual. If you use automatic ID assignment, when you enter data and save the record, the system assigns the next available sequential ID to that individual and adds the record to your database. Before adding an individual, however, you should run the Search/Match process to determine if a record already exists for that individual.

Important! When you add an individual to your database and save the new value, the system performs an automatic search to determine if a duplicate record already exists. This automatic search uses the search/match criteria established by your institution. It notifies you that a duplicate is detected, but it does not give you the opportunity to identify the duplicates. Use the Search/Match feature to help detect and identify duplicates.

Warning! Before adding organizations or entering and updating data about them, you must be familiar with PeopleSoft applications, including the Add, Update/Display, Include History, and Correct History modes and the PeopleSoft method of applying effective dates with active or inactive status.

See *PeopleTools: PeopleSoft Applications User's Guide, "Understanding Effective Dates"*

You can update personal information for an individual on the same Biographical Details page, but in update/display mode after adding the individual.

To add an individual to your database using automatic ID assignment:

1. Select Campus Community, Personal Information, Add/Update a Person.
2. Click the Add a New Value link at the bottom of the Add/Update a Person search page.

   The Add a New Value search page appears with the word *New* in the ID field.

   Warning! If you overwrite the word *NEW* in the ID field on the Add a New Value search page, and manually enter an ID for the new person, you will disrupt the autonumbering sequence included with your system. Your system administrator might need to correct the situation.

   ---

3. Click the Add button.

   The Biographical Details page appears with an ID value of *NEW*.

4. Enter at least the required data, which includes the individual's first and last name and all of the data in the Biographical Historygroup box (effective date, marital status, and gender).

5. Click Save.

   If you click Save before you enter the required data, an error message appears, reminding you that required data is missing.

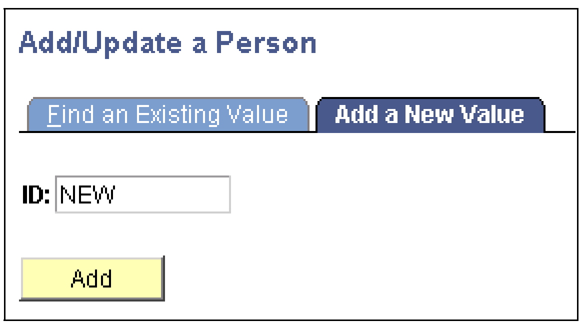
   If all required data is entered, the system runs an automatic search based on the entered data and the specified search/match criteria. The search determines if a record for this individual already exists. If a record with this data does not already exist, the system assigns the next available unique ID to the record and adds it to your database.

   If the system finds an existing record with the data, it displays the *Potential Duplicate Found* warning message.

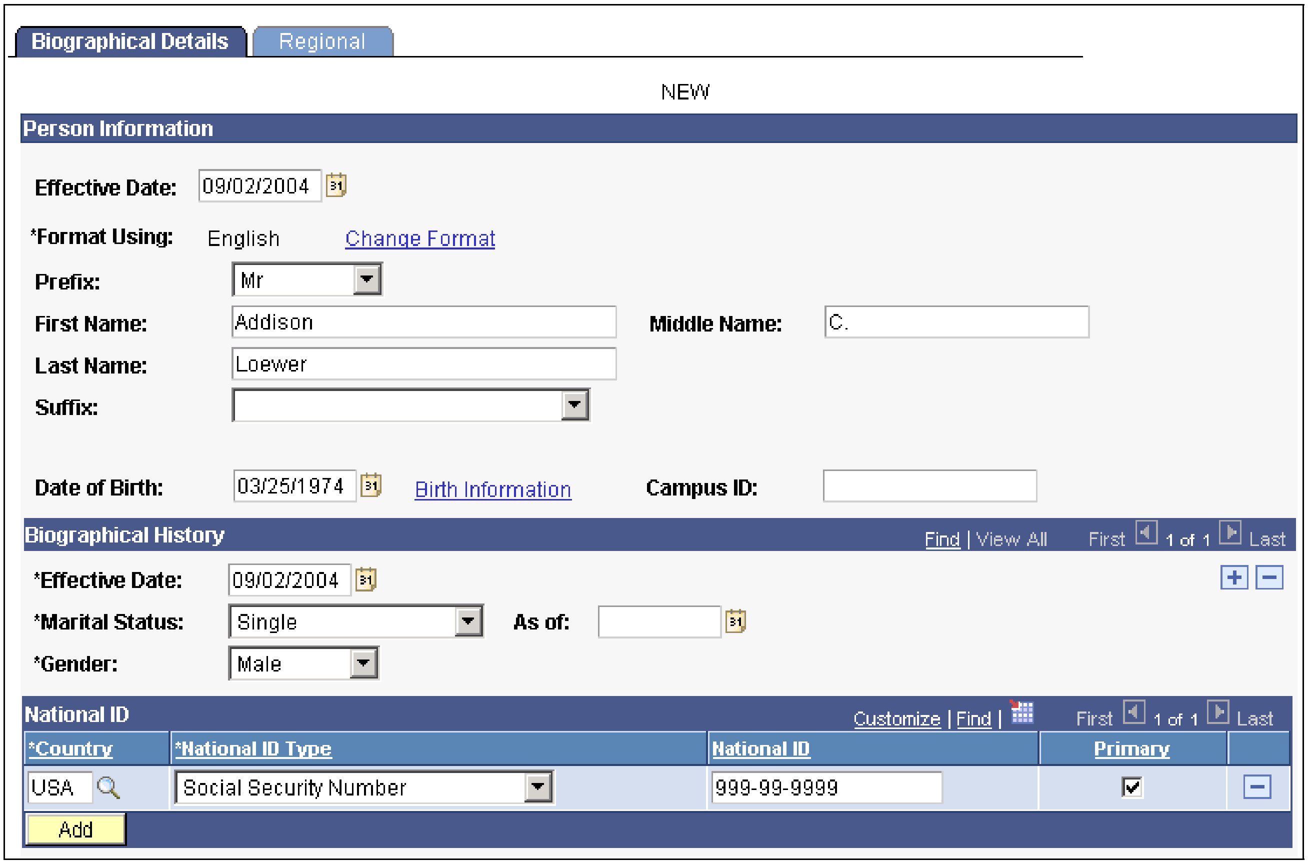
   You can click OK to add the individual or click Cancel to investigate further.

   Warning! If you click OK, the system adds the new person even though potential duplicates exist. If this is not what you want, click Cancel.

   In most cases, you should identify the potential duplicate individuals first to determine if you should add the new one. Then click Cancel to exit the message and return to the Biographical Details page; from there, access the Search/Match page to run a search and identify the duplicate.

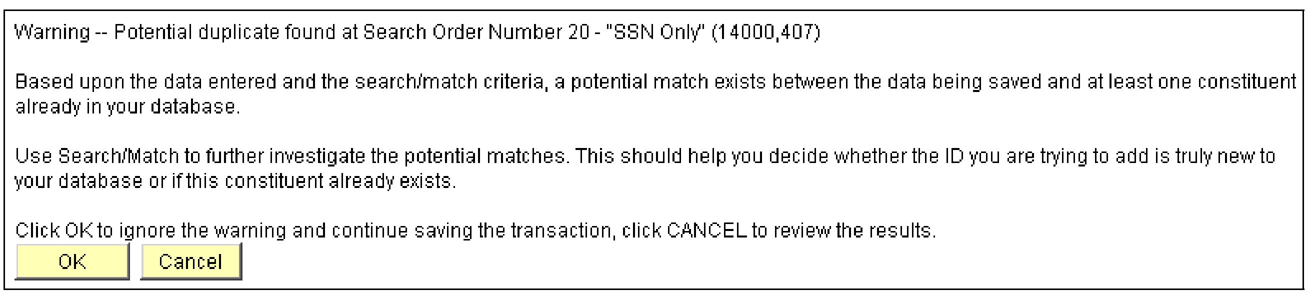


Example of the Add/Update a Person, Add a New Value page where you enter "NEW" to add a person



Example of the top of the Biographical Details page where the system displays the ID of "NEW" when you add a person

If the system detects a record with duplicate information, such as another record with the same National ID number, a *Potential Duplicate Found* warning message appears, providing you the opportunity to continue adding the person or to cancel and investigate the duplicate further.



Example of a "Potential Duplicate Found" warning message that appears when the system detects duplicate data

Adding or Updating Biographical Details Data

To create a personal information record, you must enter biographical data about that individual on the Biographical Details page. To update biographical data, you can return to the Biographical Details page or you can access pages described in the *Managing Biographical Data* section to edit or update specific information. When you save information on either the Biographical Details page or the specific information pages, the system writes it to the relevant maintenance tables and updates that information both places.

This section lists prerequisites and discusses how to:

- Enter biographical details.
- Enter regional specific data.

Prerequisites

Before entering or updating basic biographical data, you must design and set up names, addresses, and other foundational elements of Campus Community. You must also set up basic elements for personal data management.

Pages Used to Add or Update Biographical Details Data

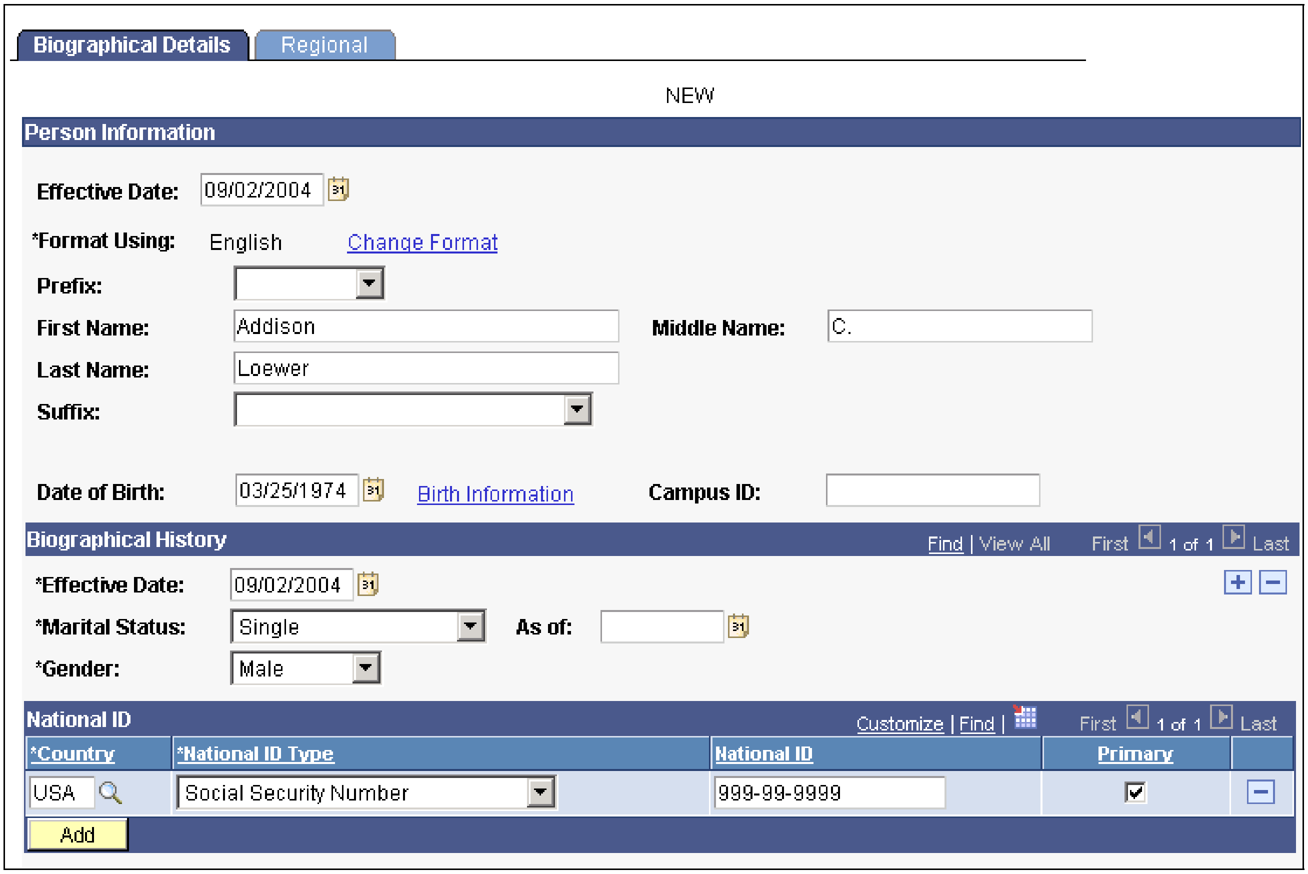
Page Name	*Definition Name*	*Navigation*	*Usage*
Biographical Details	SCC_BIO_DEMO_PERS	Campus Community, Personal Information, Add/Update a Person, Biographical Details	Enter or update an individual's name and other basic biographical data.
Birth Information	SA_BIRTH_DETAIL	Click the Birth Information link on the Biographical Details page.	Enter or review an individual's birth location data.

Page Name	***Definition Name***	***Navigation***	***Usage***
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Biographical Details page.	Edit an individual's address data. If you have enabled address validation on the Address Format page, the system validates the address that you enter when you click OK. The system validates the address by comparing it to the county, state, and city as defined on the Valid Address page. If your address does not contain a valid county, state, and city for the selected country you will receive an error. See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook*,"Setting Up and Installing PeopleSoft HRMS,"Administering Country Codes
Address Search	EO_ADDRESS_SRCH	Click the Address Search link on the Edit Address page.	Search for cities within the selected country. This link appears when you change the country by clicking the Change Address link. Enable address search on the Address Format page. See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook*,"Setting Up and Installing PeopleSoft HRMS,"Administering Country Codes
Visa/Permit Data	VISA_PERMIT_DETAIL	Click the Visa/Permit link on the Biographical Details page.	Enter or review an individual's visa and permit data, including country type, date of issue, duration, issuing authority, and other visa and permit information.
Citizenship	SA_CITIZENSHIP_DTL	Click the Citizenship link on the Biographical Details page.	Enter or review an individual's citizenship and passport detail data, including country, citizenship status, passport number, issue date, expiration date, and other relevant information.

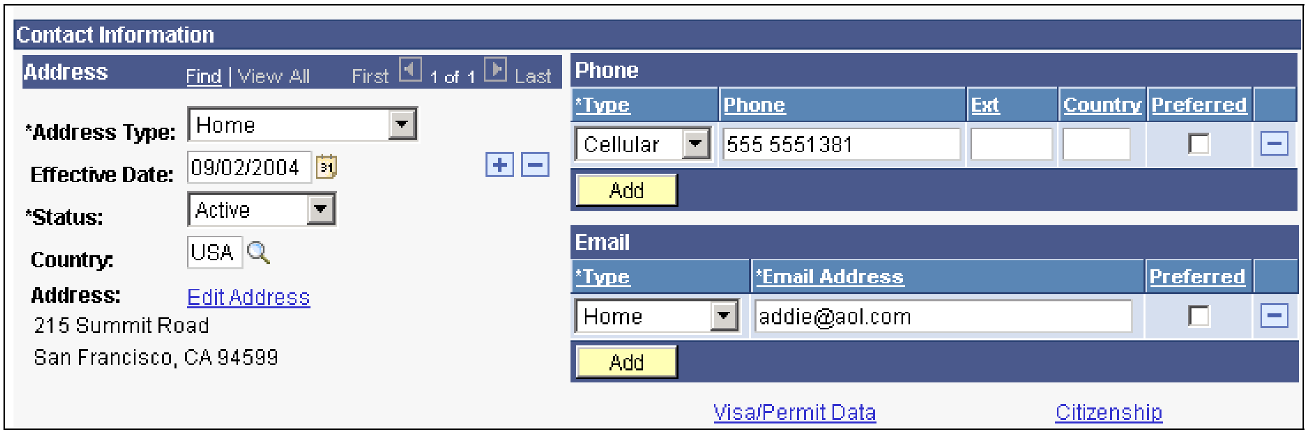
Page Name	Definition Name	Navigation	Usage
Regional	SCC_BIO_DEMO_REG	Campus Community, Personal Information, Add/Update a Person, Regional	Enter regional specific information for an individual.

Entering Biographical Details

Access the Biographical Details page (Campus Community, Personal Information, Add/Update a Person, Regional).



Biographical Details page (1 of 2)



Biographical Details page (2 of 2)

When you add a new person and are using system-generated IDs, the field at the top of the page displays the value *NEW* until you save the record. When you access the record after having saved it, the field displays the ID that the system assigned to this individual.

Person Information

Date of Birth — Enter the individual's date of birth.

Birth Information — Click this link to access the Birth Information Detail page, on which you can enter or edit the individual's birth location, country, and state.

Campus ID — Enter the campus ID with which this person is most closely associated.

Biographical History

Effective Date (Required) — Enter the date when the marital status and gender should be effective in your system.

Note. If you are changing the individual's marital status, you *must* enter an effective date.

Note. If you change the individual's name prefix, first, middle, or last name, suffix, or marital status, you *must* enter an effective date.

Marital Status (Required) and **As of** — Specify the individual's marital status (such as single, married, or divorced) and the date (if known) on which the associated marriage or divorce took place.

Values for the Marital Status field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Gender (Required)	Enter the gender of this individual. Gender is used for reciprocal relationships (mother and daughter, mother and son, brother and sister, and so on). Values are: *Male* *Female* *Unknown*

National ID

Country	Enter or confirm the country of this individual's national ID. If the individual has more than one national ID, you can add them here.
National ID Type (national ID type)	The system enters the value that you establish for this country on the National ID Type Table page. You can override this default value.
National ID	Enter the individual's national ID number. Enter the number (with or without spaces and dashes). When you exit the field, the system formats the number based on the country and NID type selected.
Primary	Select this check box to indicate the primary national ID number to use for this individual. You must indicate a primary national ID.

(CAN) Verifying Social Insurance Numbers for Canadian Employees

Invoke a modulus 10-check digit formula to verify an individual's Social Insurance Number (SIN), if needed. The formula follows federal standards for using the ninth digit in an employee SIN to verify the number.

If you enter an SIN that doesn't match the check digit that is calculated by the formula, an error message appears.

Note. To use the check digit routine for Canada NID, you must modify the national ID format within the National ID Table to 999-999-998. This is the true default for the check digit routine for Canada and will enable the routine to pass and the page to be saved.

See *PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook,* "Setting Up Personal Information Foundation Tables,"Assigning a National ID Type to a Country Code

(NLD) Verifying Social Security IDs for Dutch Employees

The Dutch National ID is commonly called the SoFi (Social/Fiscal) number. You can invoke the 11-check digit formula to verify a Dutch employee's SoFi number. The 11-check formula is a mathematical formula that evaluates the entry for the employee's Social Security ID and verifies that the result of the calculation is 11, to determine whether the national insurance/social security ID has a valid format.

(USA) When the Social Security Number is Unknown

When the Social Security number is missing, the system enters the default number that is defined on the National ID Type table, which is usually all nines (9s).

Contact Information

Address Type

Select the type of address to enter, view, or update. The system displays *Home* as the default address type and displays the data, if any, for that address type.

Edit Address

Click this link to access the Edit Address page, on which you can enter or edit address data for the address type selected. When you click OK on the Edit Address page, the data that you entered appears on the Biographical Details page when you return to the page.

Phone

Select a phone type and enter the individual's phone number for that type.

Email

Select an email type and the individual's email address for that type.

Visa/Permit Data

Click this link to access the Visa/Permit Data page, on which you can enter or update the individual's visa and permit data.

Citizenship

Click this link to access the Citizenship page, on which you can enter or update the individual's citizenship and passport data.

Entering Regional Specific Data

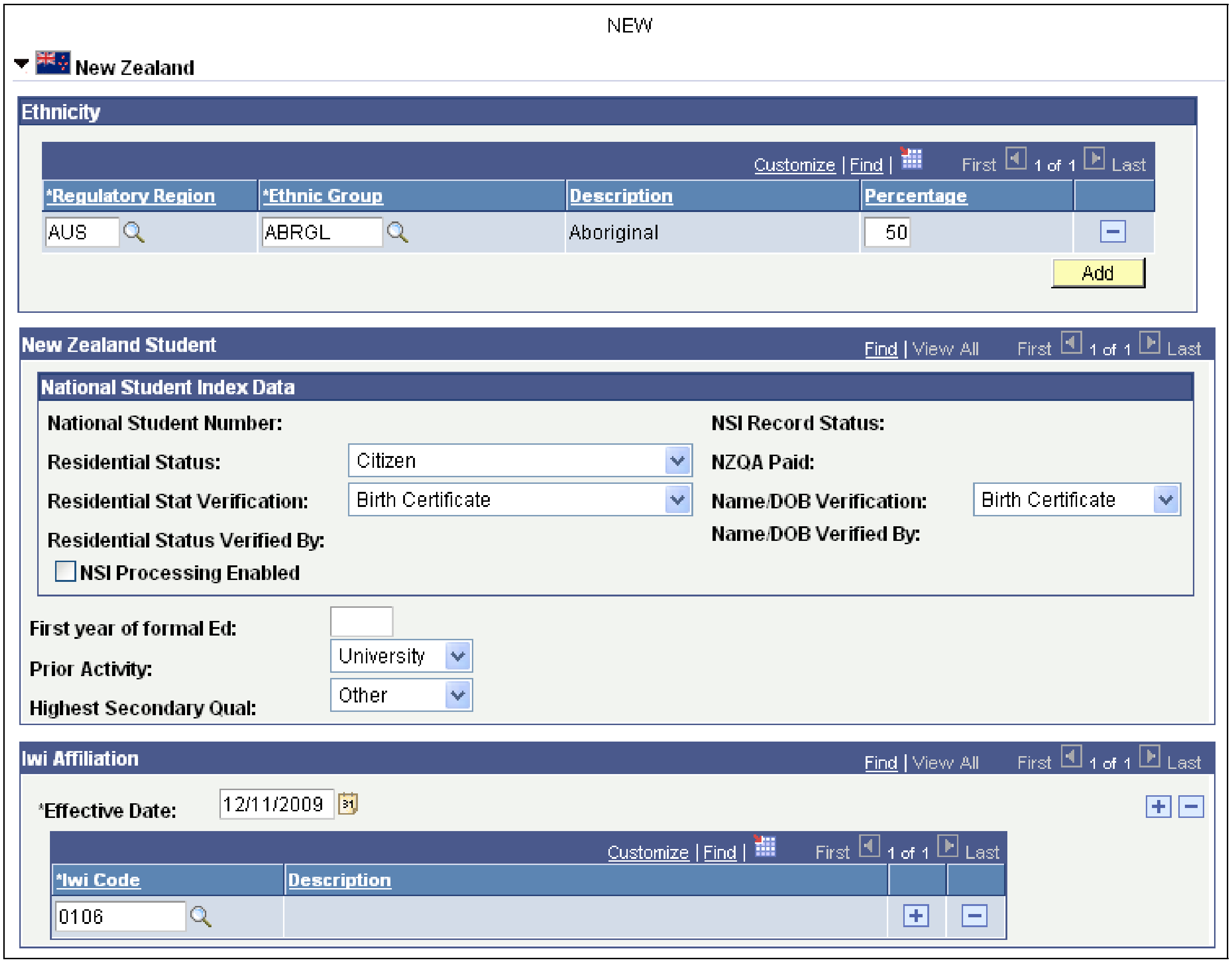
Access the Regional page (Campus Community, Personal Information, Add/Update a Person, Regional) and the area of the page that is specific to your region.

Note. As of the date of this publication, Canada, Netherlands, and USA functionality is available in PeopleSoft Campus Solutions.

Regional page (with areas collapsed; 1 of 6)

(NZL) New Zealand

The following information is specific to users with an installed country of New Zealand.



Regional page (2 of 6), New Zealand

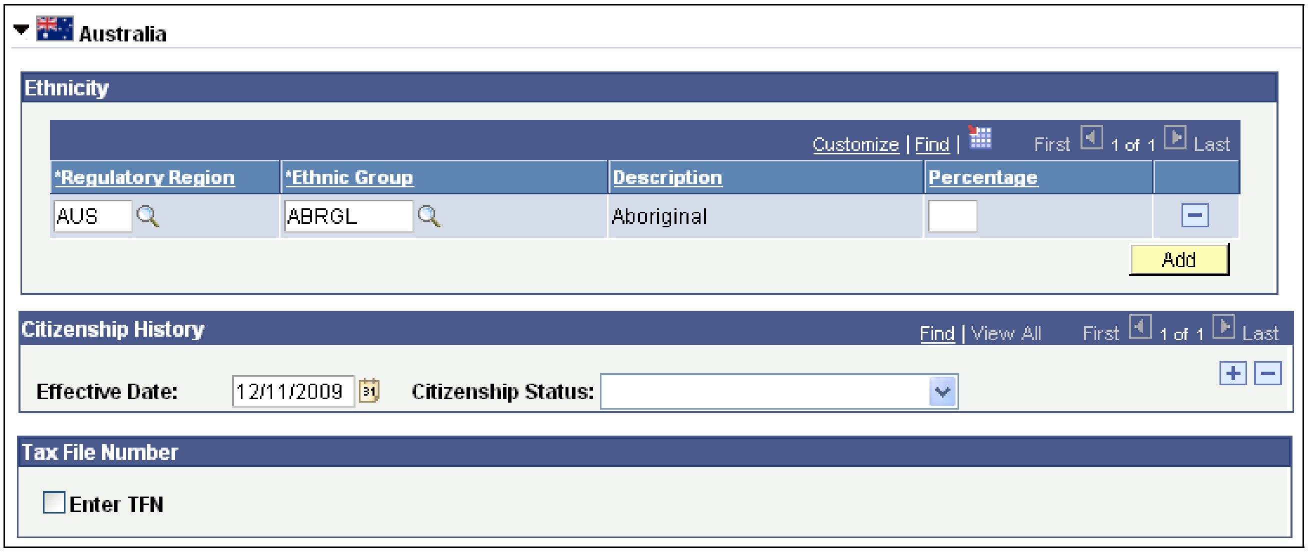
Ethnic Group	This field allows you to select multiple ethnic backgrounds. Click the Add button to add more than one ethnic group.
National Student Number	Displays the individual's unique number if received from the NSI database.

Residential Status	Enter the individual's residential status. Values include: *Au citizen* (Australian citizen) *Citizen* *Overseas* *Perm Resid* (permanent resident) *Unknown* These translate values should not be modified.
Residential Stat Verification (residential status verification)	Indicates the method used to verify the student's residential status. Values include: *BDM* – Used only by the Ministry of Education *Other Primary ID* *Birth certificate* *Passport* *Unverified* These translate values should not be modified.
Residential Status Verified By	The Post NSI Data process displays the provider code of the institution that verified the residential status data.
NSI Record Status	The Post NSI Data process displays and updates the status of the record in the NSI database. Values include: *Inactive:* The record is made inactive following the receipt of notification from a provider or Department of Internal Affairs (DIA) of a student's death or as an update from a provider that a record was created for a nonexistent student. *Active:* The record contains all of the required fields and both verifiable fields (name/date of birth pair and residential status) as *Verified.* *Partial:* The record is missing one or more of the required fields or one or both of the verified indicators set to *Unverified.* These translate values should not be modified.

NZQA Paid	The Post NSI Data process indicates whether the student's NZQA fee is paid. Values include: *Yes* *No* *Unknown* – not applicable or unknown **Note.** When set to *Yes,* the NSN is cloned to the external system ID table for the NZQA ID Upload process to load as a external system value of NZQA. When the NZQA exists, it indicates that NZQA fees are paid.
Name/DOB Verification (name/date of birth verification)	Enter the method used to verify the name and date of birth. Values include: *BDM* – Used only by the Ministry of Education *Birth certificate* *Other Primary ID* *Passport* *Unverified* These translate values should not be modified.
Name/DOB Verification By (name/date of birth verification by)	The Post NSI Data process displays and updates the provider code of the institution that verified the name and date of birth data.
NSI Processing Enabled	Select to automatically update NSI data when changes are made to NSI fields. When selected, the system updates the data if the individual has a National Student Number (NSN) in your database or if the individual does not have an NSN but has been selected by mass change (NSN App Engine process CCNSIRQN) to request an NSN from the National Student Index (NSI) and appears on the Outgoing Page of the NSI Suspense Table waiting to request an NSN from NSI. NSI fields include: First Name, Last Name, Middle Names, Gender, Date of Birth, and Residential Status fields, the verification fields for Name/DOB, and residential status fields The system automatically clears the check box when the Purge Mass Change Results process runs and the record has not yet been extracted by the Extract NSI Data process (the record is still in *Ready for Extraction* status). **Note.** If you manually select the check box and save the page, the check box becomes permanently unavailable. Manually select it only if you decide that an individual record that does not meet the criteria in your mass change definitions should be sent to NSI.

(AUS) Australia

The following information is specific to users with an installed country of Australia.



Regional page (3 of 6), Australia

Note. The Australian Tax File Number (TFN) is a number that is issued to a person by the Commissioner of Taxation. It is used to verify client identity and establish income levels. The number is an eight or nine digit number without any embedded meaning, and is based on a check digit algorithm set by the Commissioner of Taxation. You cannot view a TFN once it has been entered and saved in your PeopleSoft database.

Ethnic Group

This field allows you to select multiple ethnic backgrounds.

Click the Add button to add more than one ethnic group.

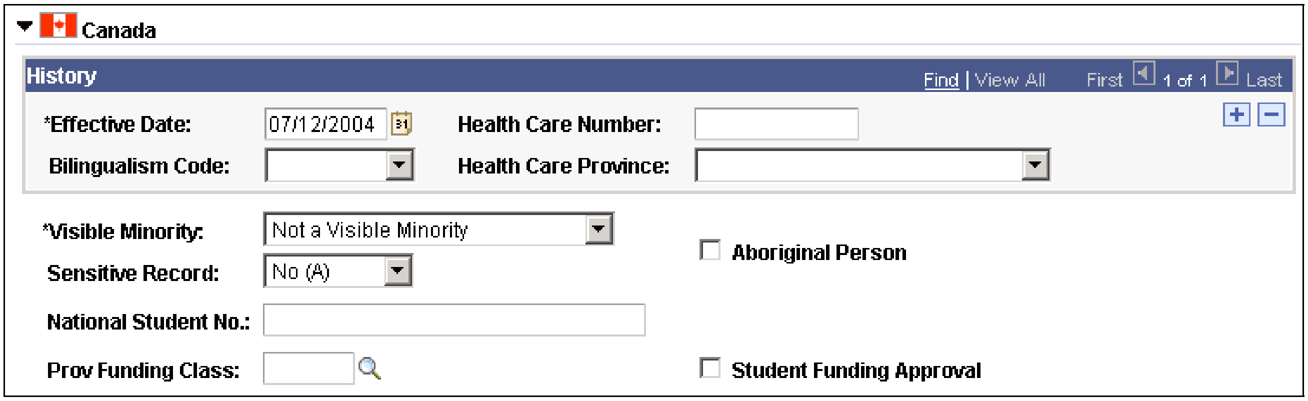
Enter TFN (enter tax file number) or **Re-enter TFN** (re-enter tax file number)

The Enter TFN check box appears only if no tax file number exists in the database for the individual. Select to display the Tax File Number field where you can enter the TFN.

The Re-enter TFN check box appears only if a tax file number has been previously saved in the database for the individual. Select to re-enter and overwrite the individual's TFN.

(CAN) Canada

The following information is specific to users with an installed country of Canada.



Regional page (4 of 6), Canada

Bilingualism Code: Enter the appropriate code for the person. If the Official Languages Act applies to the organization, use the bilingualism code as part of the Official Languages reports (PER102CN and PER108CAN) that you submit to the government.

Health Care Number and **Health Care Province**: Enter a number and select the health care province.

Visible Minority: Select a code to indicate whether the person's ethnic background is apparent based on physical appearance.

Aboriginal Person: Select this check box to indicate that the person is a Canadian aboriginal person.

Sensitive Record: Indicate whether the individual's record is sensitive, and for which the system should exclude from Statistics Canada's mail or telephone surveys.

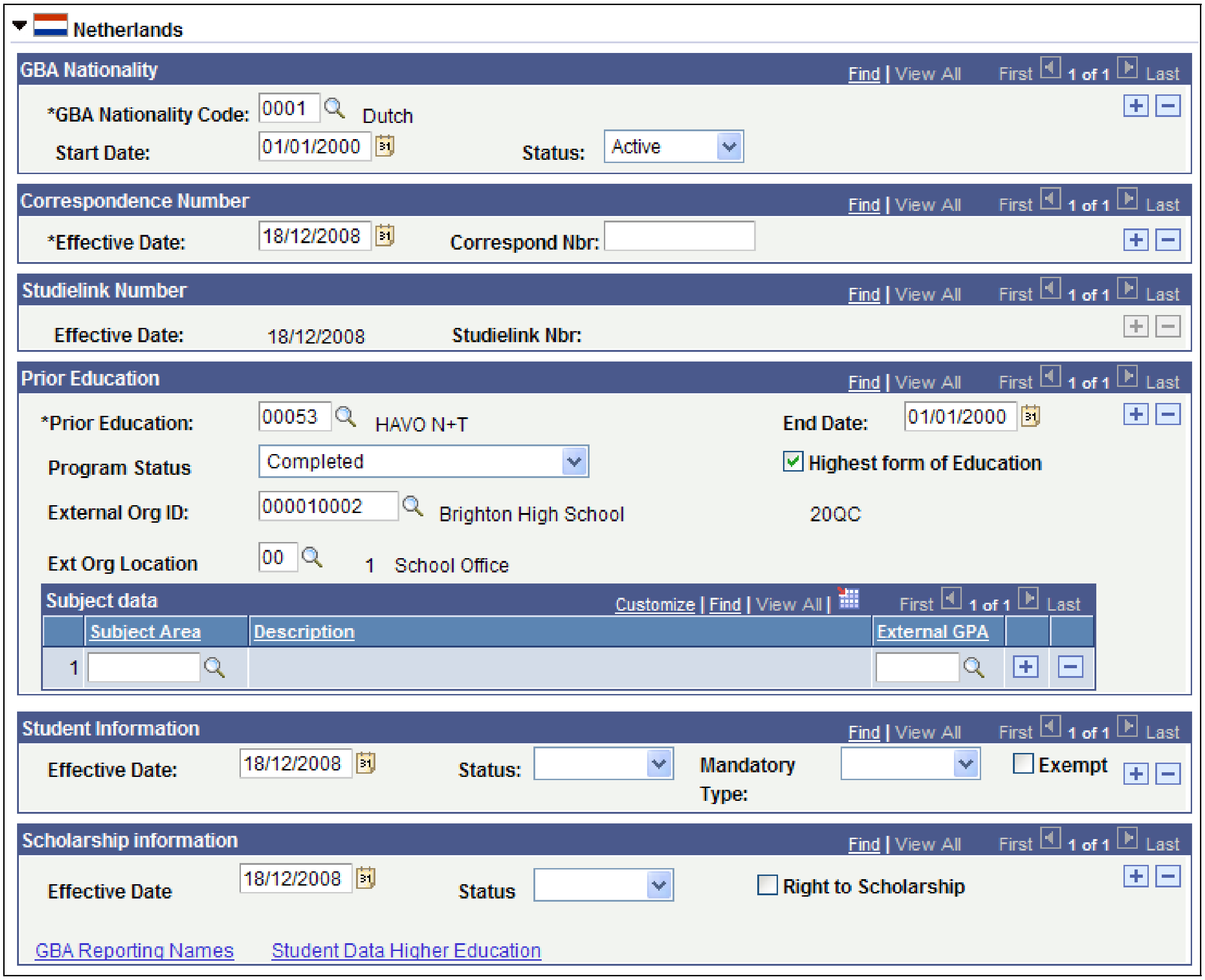
National Student No. (national student number): Enter the Canadian national student number for the student.

Prov Funding Class (provincial funding classification): Enter the funding classification by citizenship for grant purposes. This field prompts against the CAN_PROV_FUN record defined for the business unit.

Student Funding Approval: Select this check box to indicate that the student is approved for funding.

(NLD) Netherlands

The following information is specific to users with an installed country of the Netherlands.



Regional page (5 of 6), Netherlands

Dutch schools receive funding from the Dutch Government for each student who complies with a predefined set of rules. To qualify for these funding schemes, schools must adhere to strict rules about the way that students are allowed to enter the admissions and registration process and about what information is registered and in what way. The Dutch Government requests that specific information about a student's prior curriculum and test results, language skills, and personal data are stored in the student administration application that is used.

GBA (Gemeentelijke Basis Administratie), the register of all Dutch citizen data, requires the registration of a student's nationality as kept by the different city councils.

GBA Nationality Code (Gemeentelijke Basis Administratie nationality code), **Start Date,** and **Status**	Enter the GBA nationality code, start date, and status. If a person's nationality changes, add a new row. Enter the new GBA nationality code and start date, with a status of *Active.* The new nationality becomes active and the old nationality row is set to status of *Inactive.* This enables you to maintain GBA code history.

Correspond Nbr (correspondence number)	Enter the CBAP (Central Bureau for Admissions and Registration) correspondence number. The correspondence number is a crucial element in the data exchange with CBAP and CRI-HO (the current Register of enrollments in Higher Education). In specific cases a correspondence number of a student may change. Add a new row and enter the new number with a status of *Active.* To track the data exchanged, you must store both the old and the new numbers.
Prior Education	Enter data for all known prior education for the student. When all prior education is entered, the administrator can combine relevant schools (external organization IDs) and all subjects with relevant grade point averages.
Program Status	Enter the status of the prior education specified. Values are: *Completed* *Completed* *Running*
External Org ID (external organization ID)	Enter the ID of the education institution where the prior education took place.
Ext Org Location (external organization location)	Select a Sub BRINcode.
End Date	Enter the date on which the prior education was completed.
Highest form of Education	Select this check box if this is the highest level of education attained by the student.
External Subject Area and **External GPA** (external grade point average)	Enter the specific course subject and corresponding grade.
GBA Reporting Names (Gemeentelijke Basis Administratie reporting names)	Click this link to access the Names page, on which you enter all of an individual's first names as delivered by CBAP (Central Bureau for Admissions and Registration) as well as all of the individual's initials and a longer last name.

Mandatory Type or **Exempt**

Enter a value to indicate the degree to which the type of education that your institution provides is, by Dutch law, mandatory for the student.

Mandatory Type field values are:

Complete Exempt

Fully Mandatory

Not Mandatory

Partial Exempt

Partial Mandatory

If no level of education is mandatory for the student, select the Exempt check box.

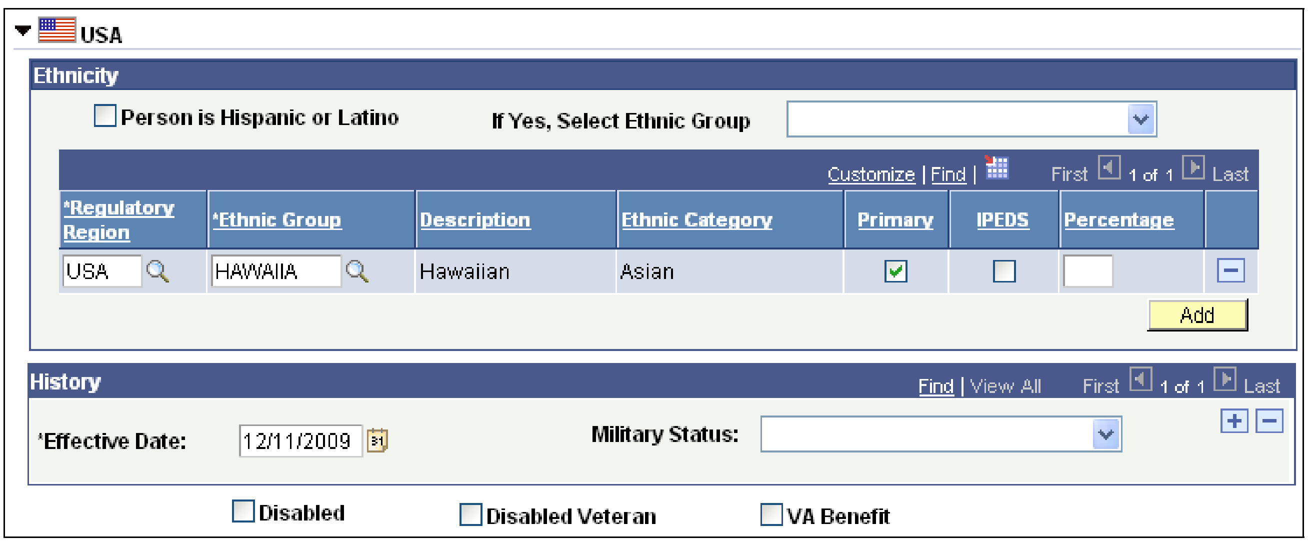
Right to Scholarship

Select this check box if the student is eligible for a government scholarship.

Note. Mandatory Type and Right to Scholarship values are used for the registration of Base Register Education, *Basis Register Onderwijs* (or BRON) related data.

(USA) United States

The following information is specific to users with an installed country of *USA* (United States of America).



Regional page (6 of 6), USA

Person is Hispanic or Latino

Select this check box to indicate whether the person is of Hispanic or Latino origin.

For further information on guidelines for defining if person is Hispanic or Latino, see http://nces.ed.gov/statprog/2002/std1_5.asp.

Note. You must select this check box if a row exists in the grid that indicates Hispanic origin.

If yes, Select Ethnic Group	If you selected the Person is Hispanic or Latino check box, then select an ethnic group code to further refine the person's ethnicity. When you select a value, row changes occur as follows: • If no value exists in the drop-down list and you select a value that does not currently exist on the record, the system inserts a new row into the grid. • If a value exists in the drop-down and that value exists in the grid, when you select a new value from the drop-down, the system updates the existing row. • If a value exists in the drop-down and blank is selected from the drop-down, nothing affects existing rows. • If the drop-down value is blank and you select a value that already exists in the grid, nothing happens to the existing rows.
Ethnic Group	This field allows you to select multiple ethnic backgrounds. Click the Add button to add more than one ethnic group.
Ethnic Category	The system populates this field based on the value in the EEO Ethnic Group field for U.S. regulatory region ethnic groups or the Ethnic Category for ethnic groups tracked for other regulatory regions. For any ethnic group codes with a regulatory region of USA, this field should always map to one of these five races: • American Indian or Alaska Native. • Asian. • Black or African American. • Native Hawaiian or Other Pacific Islander. • White. For further information on guidelines for mapping ethnic group codes to the five races, see http://nces.ed.gov/statprog/2002/std1_5.asp.
Primary	Select this check box to indicate with which ethnic group the person most directly identifies.
IPEDS	Select this check box to indicate that the data has been submitted by a reliable source, such as application data or self service, in response to the IPEDS questions.
Percentage	Indicate the share of 100 of which this person derives his or her ethnicity. The system displays a warning if you enter an amount over 100.
Military Status	Select the value that describes this person's current military status.

Disabled	Select this check box to indicate that the individual is disabled and might be covered by the Americans with Disabilities Act (ADA).
Disabled Veteran	Select this check box to indicate that the individual is a veteran who was disabled in the line of duty and might be entitled to certain U.S. Veteran's benefits as well as being covered by the ADA.
VA Benefit (Veterans Administration benefit)	Select this check box to indicate that the individual currently receives veteran benefits from your institution. The U.S. Veterans Administration requires a hardcopy report of individuals who receive veterans benefits from your institution. When the VA Benefit check box is selected, the system includes this individual when that report is run.

Note. When you save the page, the system records the operator ID and the last updated date and time, although the fields do not appear here.

Chapter 35

Assigning and Managing Affiliations

This chapter provides an overview of affiliations and discusses how to:

- Add and update affiliations.
- Process affiliations in batch.
- Delete affiliations.
- Review affiliations.
- View affiliation codes.
- View affiliation exceptions.

Understanding Affiliations

Institutions often need to know what relationships a person has with them. They need to be aware of any current or past relationships, as well as any simultaneous relationships. To track these relationships, known as affiliations with an institution, it's important to be able to define affiliations within an affiliation framework. Within this extensible framework, institutions can define hierarchies (such as Student > Undergrad > Engineering) as well as rules for activating or inactivating affiliations.

Affiliations are keyed by institution and are effective-dated; they begin and end, and a person can have multiple, simultaneous affiliations assigned at one time or throughout time. The system notes the user ID and date and time any affiliation is assigned or updated.

Note. The Affiliation feature is a more robust method of tracking a person relationship with the Institution. However, the existing Relations with Institutions functionality in Campus Community will not be replaced with this release.

There are three ways in which affiliations are created and updated:

- Manually by an administrator, for individual IDs, on the Add/Update Affiliations page.
- Automatically by batch processing, for groups of IDs, on the Affiliation Batch Processing page.

- Triggered by specific affiliations events, through Integration Broker and XML messaging.

  A change in a person's relationship, or affiliation, with the institution (for example, when a. prospect becomes an applicant, applicant becomes a student, student becomes an employee, or when a student graduates) can automatically generate an update to that person's affiliations record.

  Affiliations uses constituent web services to communicate changes to a person record. The *PeopleSoft Campus Solutions Affiliations Developer's Guide* contains detailed information about web services in general, the Affiliation Engine, as well as examples of XML messages for affiliations.

  See *PeopleSoft Campus Solutions Constituent Web Services Developer's Guide,* posted to My Oracle Support https://support.oracle.com.

  and Chapter 20, "Using Constituent Web Services," page 237.

Affiliation icon

The Affiliation icon appears on all pages that contain bio/demo data in the system, which enables you to review the details about a person's affiliations with an institution.

See Also

PeopleSoft Contributor Relations 9.0 PeopleBook, "Managing Constituent Data"

Adding and Updating Affiliations

This section discusses how to:

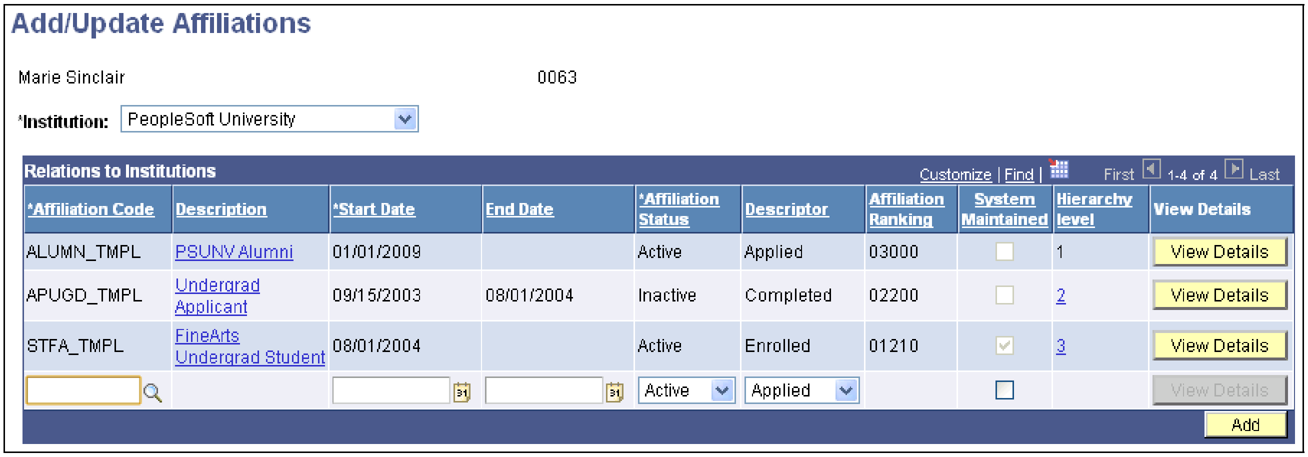
- Assign and review affiliations.
- View affiliation details.

Pages Used to Add and Update Affiliations

Page Name	*Definition Name*	*Navigation*	*Usage*
Add/Update Affiliations	SCC_AFL_ADDUPD	Campus Community, Affiliations, Add/Update Affiliations	Assign or update affiliation codes for a person.
View Affiliations Details	SCC_AFL_VWHIST_SEC	Click the View Details button on the Add/Update Affiliations page.	View affiliations details and history for a person, and update status and descriptors here.

Assigning and Reviewing Affiliations

Access the Add/Update Affiliations page (Campus Community, Affiliations, Add/Update Affiliations).



Add/Update Affiliations page

Affiliation Code Displays the name of the code assigned to the person. If adding a manual affiliation for a person, choose a code from the list of all available affiliation codes established for the institution.

Description Displays the description of the affiliation code. Click the link to view information for a specific affiliation code on the Affiliation Definition View page.

Descriptor Displays the supporting description associated with the Status. Statuses and their descriptions are set up on the Affiliation Status Setup page and are assigned and updated on the page invoked by the View Details button.

Affiliation Ranking Displays the five-digit rank assigned to the affiliation code. Rankings are set up on the Affiliation Ranking page.

System Maintained If you select this check box, the system will make all affiliation updates going forward. If you clear this check box, all affiliation updates must be done manually. You can select the option to have the system maintain an affiliation at any time. This selection is accomplished on the page invoked by the View Details button.

Hierarchy Level Displays the hierarchy level of the specified affiliation code. Click the link to access the Parent Affiliation Details page.

View Details Click this button to access the View Affiliations Details page, which displays the history of the affiliation code assignment and enables setting the affiliation end date, affiliation status, affiliation status descriptor, and System Maintained check box.

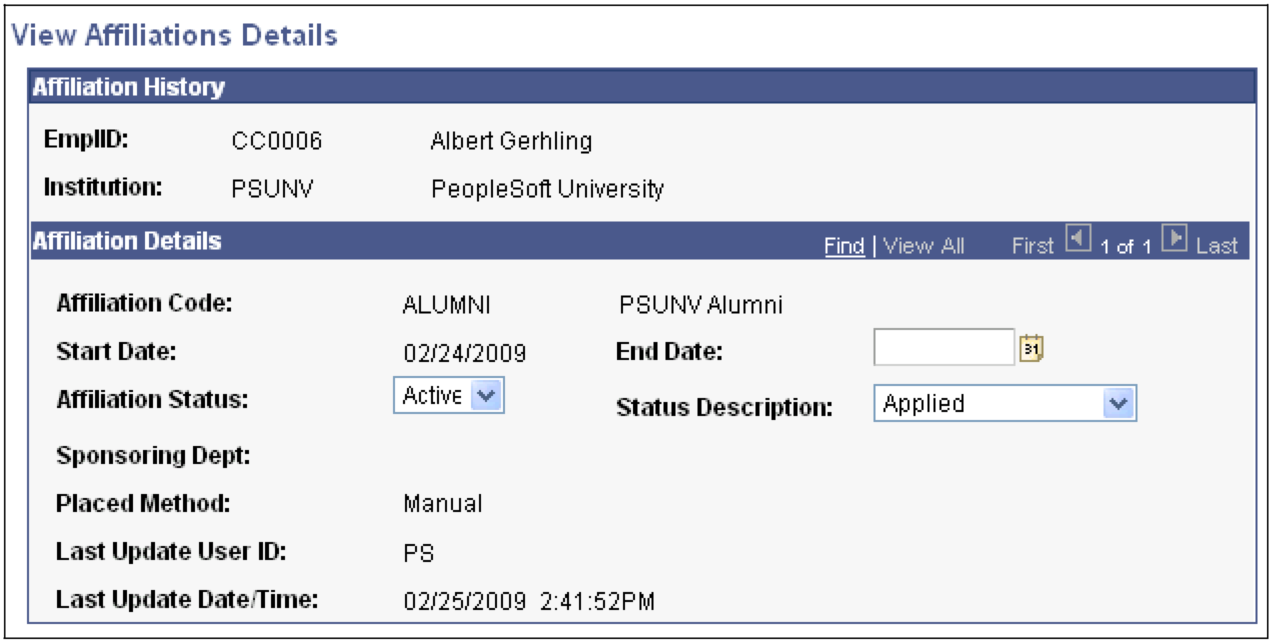
When you click the Save button, the system generates and sends the Constituent Outbound message to any external system that subscribes to it.

See Also

PeopleSoft Campus Solutions Affiliations Developer's Guide, posted to My Oracle Support https://support.oracle.com

Viewing Affiliation Details

Access the View Affiliations Details page (Click the View Details button on the Add/Update Affiliations page).



View Affiliations Details page

Affiliation Status	Select the status of the affiliation.
Status Description	Select the supporting description associated with the Affiliation Status. Status Descriptions are set up on the Affiliation Status Setup page.
System Maintained	If you select this check box, the system will make all affiliation updates going forward. If you clear this check box, all affiliation updates must be done manually.
Placed Method	The system displays how the affiliation code was assigned to the person. Options are *Manually, Event,* or *Batch.*

The values that appear for the Sponsoring Department and Affiliation Ranking fields are assigned during affiliation setup.

Processing Affiliations in Batch

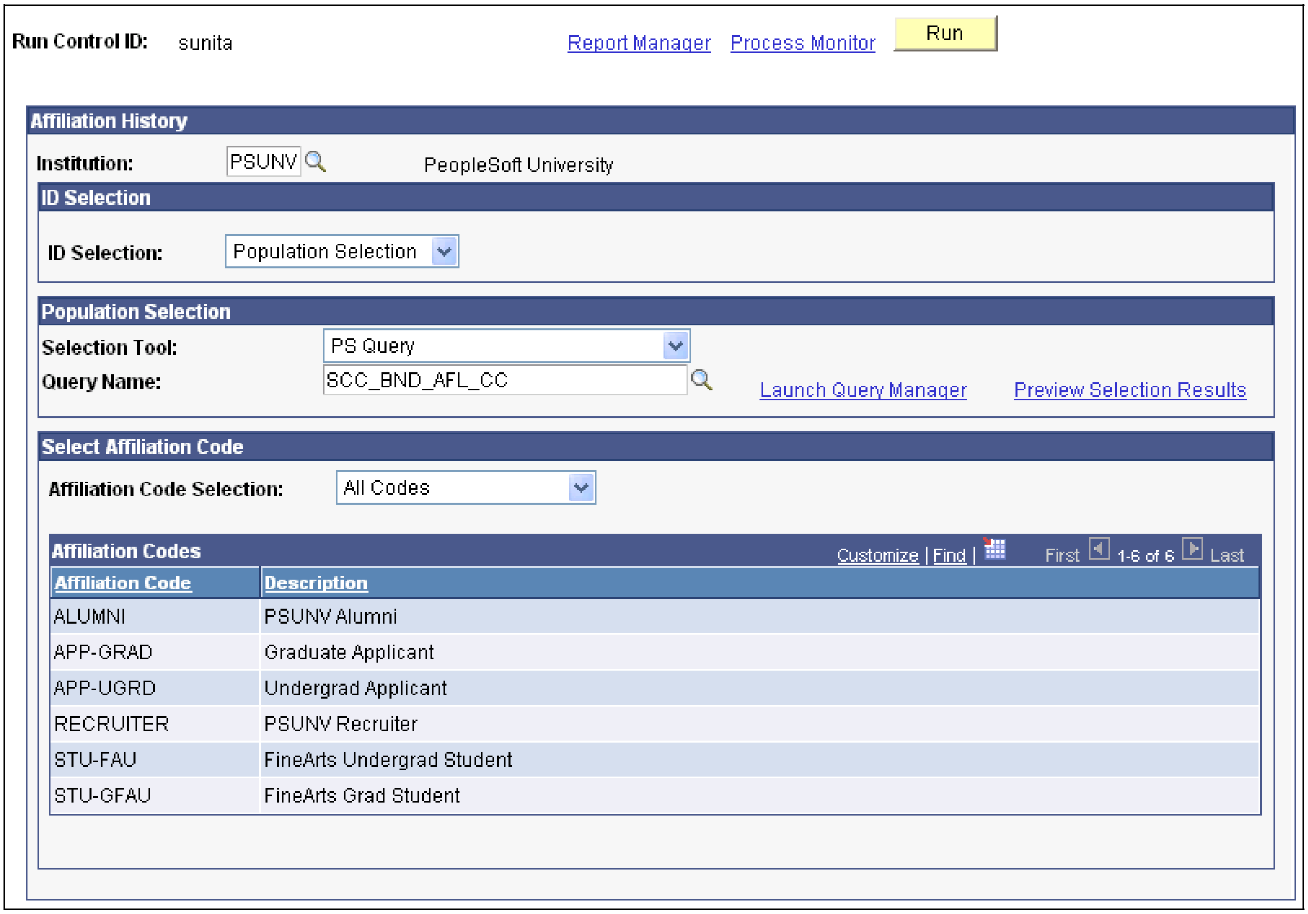
This section discusses how to use batch processing to assign or update affiliations to groups of IDs.

Page Used to Process Affiliations in Batch

Page Name	***Definition Name***	***Navigation***	***Usage***
Affiliation Batch Processing	SCC_AFL_RUN_CNTL	Campus Community, Affiliations, Affiliation Batch Processing	Choose processing parameters and run the Batch Affiliations process.

Running the Affiliations Batch Process

Access the Affiliation Batch Processing page (Campus Community, Affiliations, Affiliation Batch Processing).



Affiliation Batch Processing page

ID Selection

ID Selection

Select *Person ID* or *Population Selection.*

If you select *Person ID,* the Person ID field appears. Enter a single ID to assign affiliation code(s).

If you select *Population Selection,* the Population Selection group box appears. Enter a Selection Tool (either External File or PS Query) and the corresponding values for the fields associated with that selection tool.

Person ID

Enter the ID for the person you want to evaluate and assign the affiliation(s) specified in the Affiliation Codes group box.

Select Affiliation Code

Affiliation Code Selection

Select *One or More Codes,* or *All Codes.* If you select *All Codes,* the system evaluates all affiliation codes currently available within an institution for the person. Select *One or More Codes* to specify the exact affiliation code or codes to be evaluated for the person.

Clear Codes	Click this button to remove all codes listed on the page. You can use this button regardless of whether you assign a code to one person or you use Population Selection.
Affiliation Code	Specify the affiliation code(s) to be assigned to the person. If you selected *One or More Codes* in the Affiliation Code Selection field, enter the specific affiliation codes that you want the system to evaluate to determine if the necessary criteria is met to assign the affiliation code. If you selected *All Codes.* in the Affiliation Code Selection field, then all affiliation codes available for the institution appear and are evaluated to determine if the criteria is met for each separate affiliation code.

When you click the Run button, the system creates the group of people and runs the SCC_AFL_RUN Application Engine process. The process evaluates the criteria for each affiliation code specified and determines whether an affiliation in the Affiliation Codes group box can be assigned to the specified person IDs or to the group of people created by the Population Selection criteria.

For each ID, the system evaluates whether the person meets the criteria for an affiliation code; if so, the process then applies the affiliation code to that person's record based on the criteria specified for the affiliation. This criteria is specified as part of the affiliation definition in the Application Class field on the Definition page. If the person does not meet the criteria, the process does not assign the affiliation and moves on to evaluate the next potential affiliation for that person or moves to the next person in the group, depending on how you defined the process criteria. For example, if the affiliation criteria expects a person to be a graduate student but the person does not have an assigned academic career of *Graduate*, then the criteria is not met for that affiliation and the process does not assign the affiliation to the person ID.

For groups created through the Population Selection process, the system evaluates each group member and assigns affiliation codes only to those members who meet the criteria and skips the affiliation codes for which the members do not qualify. The process does not remove expired or invalid codes, but does end date the affiliation. The process ignores manually created affiliation codes, and also ignores manually assigned codes if the System Maintained check box is not selected for that code.

During this process, as each affiliation is assigned to a person, the system publishes a Constituent Outbound message.

When the process is complete, view results on the View Person Affiliations component.

Note. This batch process differs from manual assignment functionality on the Add/Update Affiliations page; the manual process does not require the person to meet any criteria before an affiliation can be created.

See Also

PeopleSoft Campus Solutions Affiliations Developer's Guide, posted to My Oracle Support https://support.oracle.com

Deleting Affiliations

This section provides an overview of affiliation delete functionality and discusses how to:

- Select and delete affiliation codes.
- Delete affiliations associated with a person.

Understanding Affiliation Delete Functionality

Affiliation delete functionality enables you to select and completely delete affiliations associated with a person or group of people. Administrators have the ability to completely delete an affiliation or multiple affiliations for a specific ID as well as the ability to delete an affiliation or multiple affiliations for a specific population as defined through Population Selection. This functionality is used when there is no need to keep any history associated with the affiliation code and when the decision to simply designate an affiliation code as *inactive* or *deleted* is not a viable option.

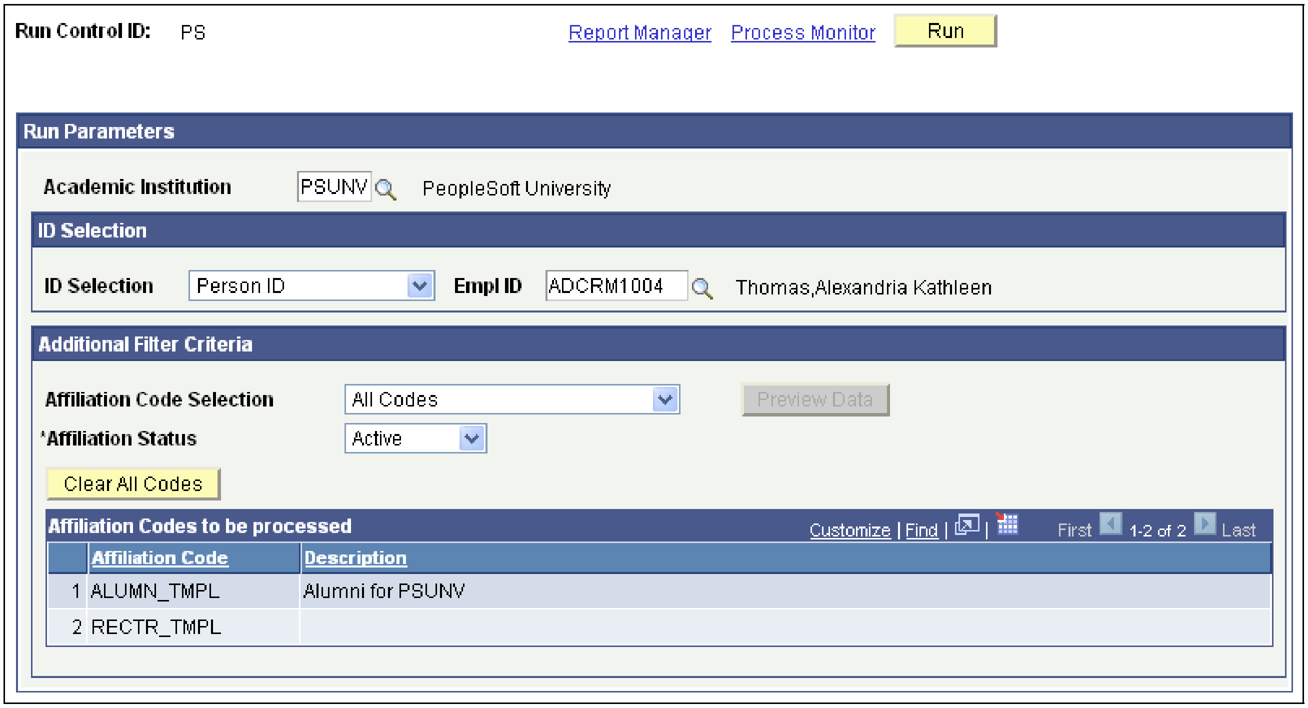
Note. Instead of deleting an affiliation code, the administrator can assign the affiliation code the status of *inactive*, which would prevent the relationship (affiliation code) from being used in the future while still maintaining the history that it existed at one time.

Pages Used to Delete Affiliations

Page Name	*Definition Name*	*Navigation*	*Usage*
Affiliation Select Delete Processing	SCC_AFL_PRG_RUNCTL	Campus Community, Affiliations, Affiliations Select Delete	Choose processing parameters and run the process to select and then delete affiliation codes.
Delete Affiliations	SCC_AFL_FILTER	This page becomes available after you run the SCC_AFL_PRDL Application Engine process on the Affiliation Select Delete Processing page.	Delete ID/Affiliation code pairs that met the filter criteria specified on the Affiliation Select Delete Processing page.

Selecting and Deleting Affiliation Codes

Access the Affiliation Select Delete Processing page (Campus Community, Affiliations, Affiliations Select Delete).



Affiliation Select Delete Processing page

ID Selection

ID Selection

Select either *Person ID* or *Population Selection.*

If you select *Person ID,* enter a single ID to list affiliation code(s) associated with this ID. If you select *Population Selection,* the Population Selection group box appears. Enter a Selection Tool (either *External File* or *PS Query)* and the corresponding values for the fields associated with that selection tool.

Empl ID

Enter the ID for the person for whom you want to delete affiliation code(s).

Additional Filter Criteria

Affiliation Code Selection

Select *All Codes* or *One or More Codes.*

If you select *All Codes,* the system evaluates all affiliation codes currently available within an institution for the person. Select *One or More Codes* to specify the exact affiliation code or codes to be evaluated for the person.

Affiliation Status

Select the status of the affiliation code you are considering deleting. System-defined affiliation status values are *Active, Inactive,* or *Error.*

Clear All Codes

Click this button to remove all affiliation codes listed to be processed as listed in the group box. You can use this button regardless of whether you are referring to a code for one person or you use Population Selection.

Preview Data This button appears after you click the Run button to run the SCC_AFL_PRDL process that creates the people/affiliation code pairs that meet the criteria specified by the filter. This is the group that can be acted upon to delete affiliations. The *Preview Data* button is unavailable for selection until the process has been run.

Click the Run button after selecting IDs and applying the additional filter criteria for affiliation codes and affiliation status. When you click the Run button, the system creates the group of people and runs the SCC_AFL_PRDL Application Engine process. The process evaluates each affiliation code specified in the Affiliation Codes to be processed group box with the affiliation status for each ID from the person ID field or from the group of people created by the Population Selection process.

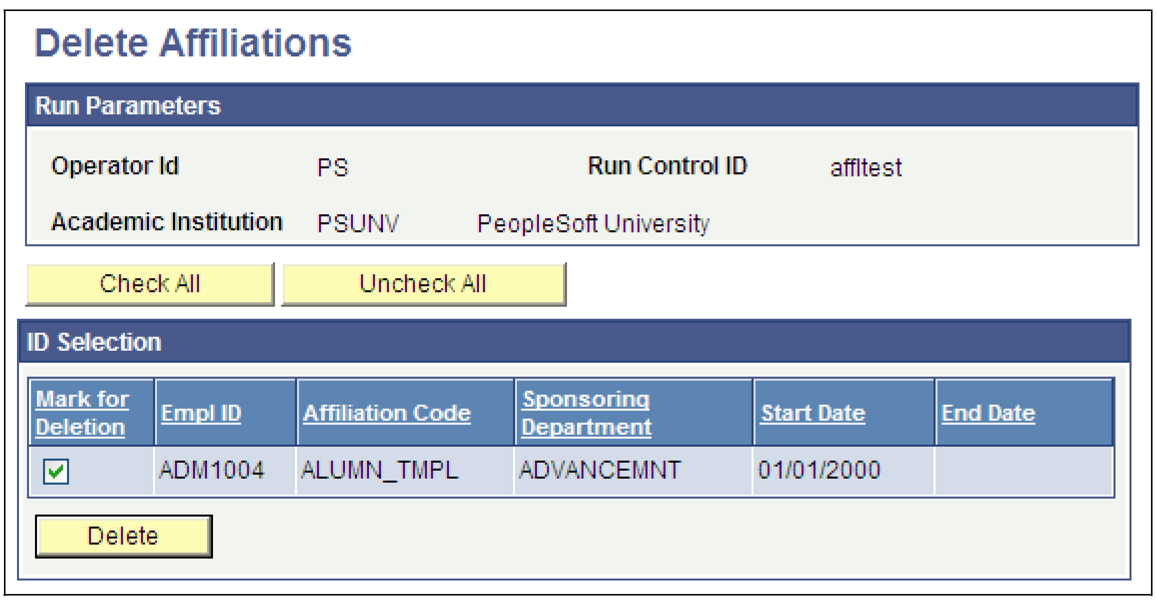
For each ID, the system evaluates whether the person has the affiliation code assigned with the affiliation status as indicated. If the person does not have the affiliation code assigned with the associated status, the process does not include this affiliation code for this person in the list and moves on to evaluate the next potential affiliation code for that person.

For groups created through the Population Selection process, the system evaluates each group member and determines if the ID has the affiliation code assigned with the associated status.

All IDs and affiliation codes that match the criteria appear on the Delete Affiliation page, where the actual ID/Affiliation code pair can be selected for deletion.

Deleting Affiliations Associated With a Person

Access the Delete Affiliations page (Run the SCC_AFL_PRDL Application Engine process on the Affiliation Select Delete Processing page).



Delete Affiliations page

All IDs marked for deletion upon clicking the Save button will be saved to a temporary list and the Delete button will appear. Click the Delete button to actually delete the IDs marked for deletion.

Reviewing Affiliations

This section discusses how to:

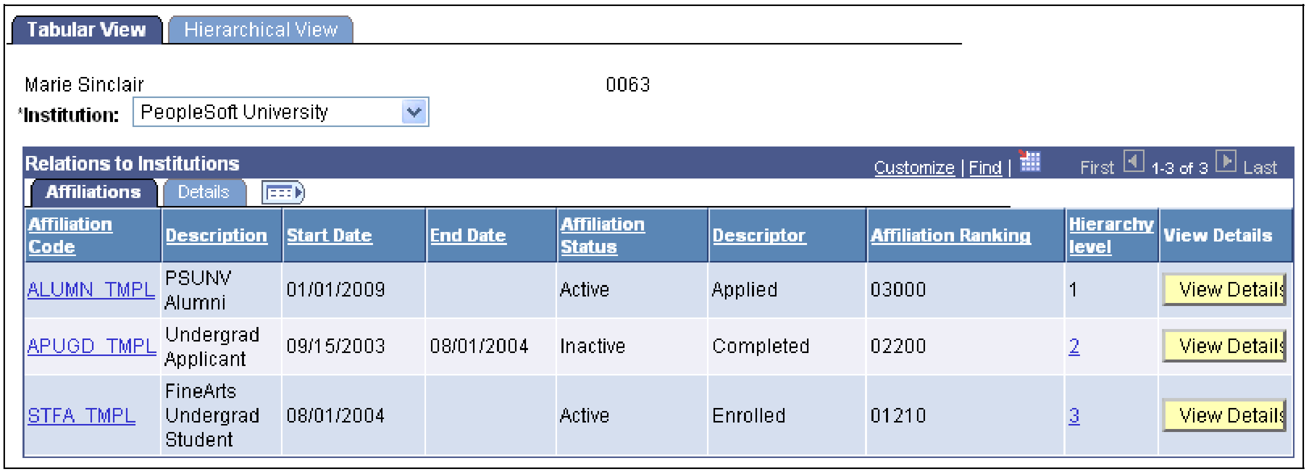
- Review affiliation data in a tabular view.
- Review affiliation data in a tree view.
- Review affiliation data throughout the system.

Pages Used to Review Affiliations

Page Name	***Definition Name***	***Navigation***	***Usage***
Tabular View	SCC_AFL_VIEW	Campus Community, Affiliations, View Person Affiliations, Tabular View	View information for all current and past person affiliations in the system.
Hierarchical View	SCC_AFL_HIR_PERSON	Campus Community, Affiliations, View Person Affiliations, Hierarchical View	View information for all current and past affiliations for a person in the system, in a tree structure.
Parent Affiliation Details	SCC_AFL_PARENT_SEC	Click a Hierarchy level link on the Tabular View page, Affiliations tab.	View details about the others levels of the selected affiliation hierarchy.
View Affiliation History	SCC_AFL_HIST_SEC	Click the View History button on the Tabular View page, Affiliations tab.	View historical details of the selected affiliation code.

Reviewing Affiliation Data in a Tabular View

Access the Tabular View page.



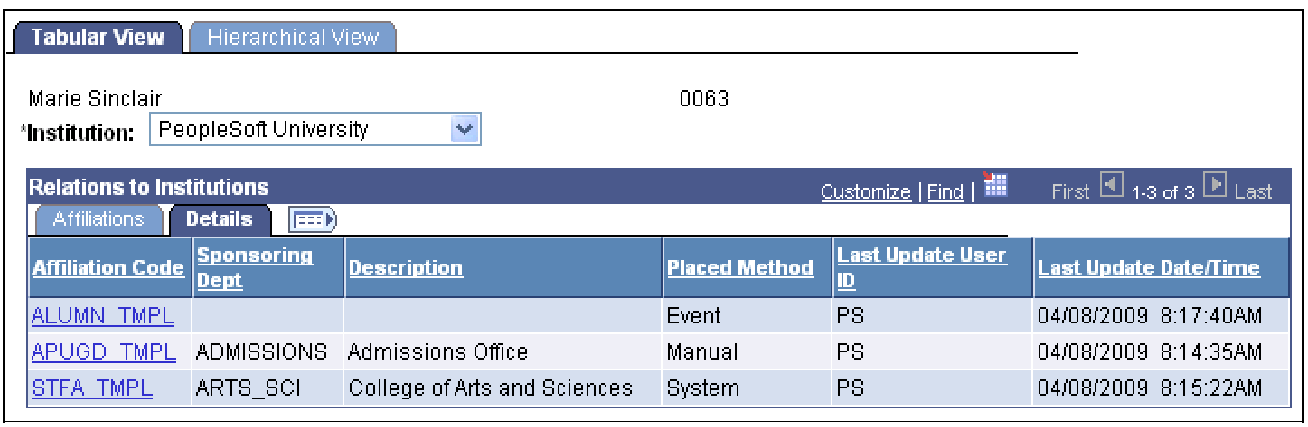
Tabular View page, Affiliations tab

The fields on this page are similar to those on the Add/Update Affiliation page.

Affiliation Code Click this link to view affiliation setup details on the Affiliation Definition View page.

Hierarchy Level Click this link to view information about the higher levels of the hierarchy on the Parent Affiliation Details page.

View Details Click this button to view historical details of the affiliation code on the View Affiliation Details page.

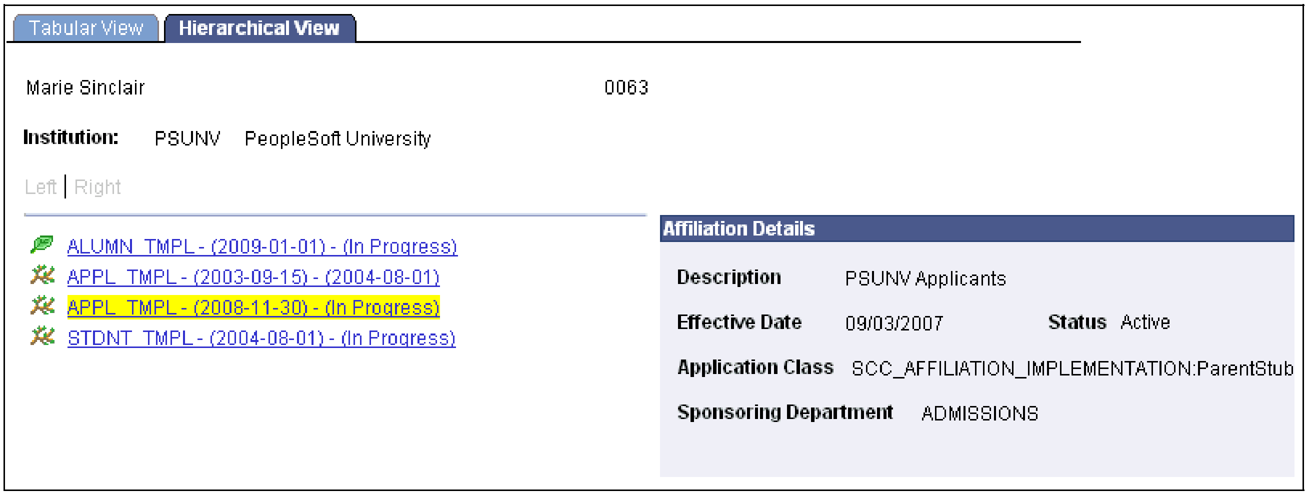


Tabular View page, Details tab

As on the Affiliations tab, click the Affiliation Code link to access the Affiliation Definition View page.

Reviewing Affiliation Data in a Hierarchical View

Access the Hierarchical View page.



Hierarchical View page

The leaf icons indicate the lowest level of an affiliation hierarchy (in the example above, *ALUMNI* is a single-level hierarchy). Branch icons indicate that the hierarchy level has children; those children have leaf icons. Click any hyperlink to view the associated affiliation details in a pop-up window on the page.

Reviewing Affiliation Data Throughout the System

The Affiliation icon appears on all Campus Solutions biographic and demographic data pages. You can access it wherever you find service indicator icons.

Affiliation icon

Click the icon to access the View Person Affiliation page, which displays all of the active affiliations assigned to that person. The icon appears on pages and subpages throughout Campus Community, as well as pages in other Campus Solutions features where you create and update person records (such as Admissions and Campus Self Service).

Viewing Affiliation Codes

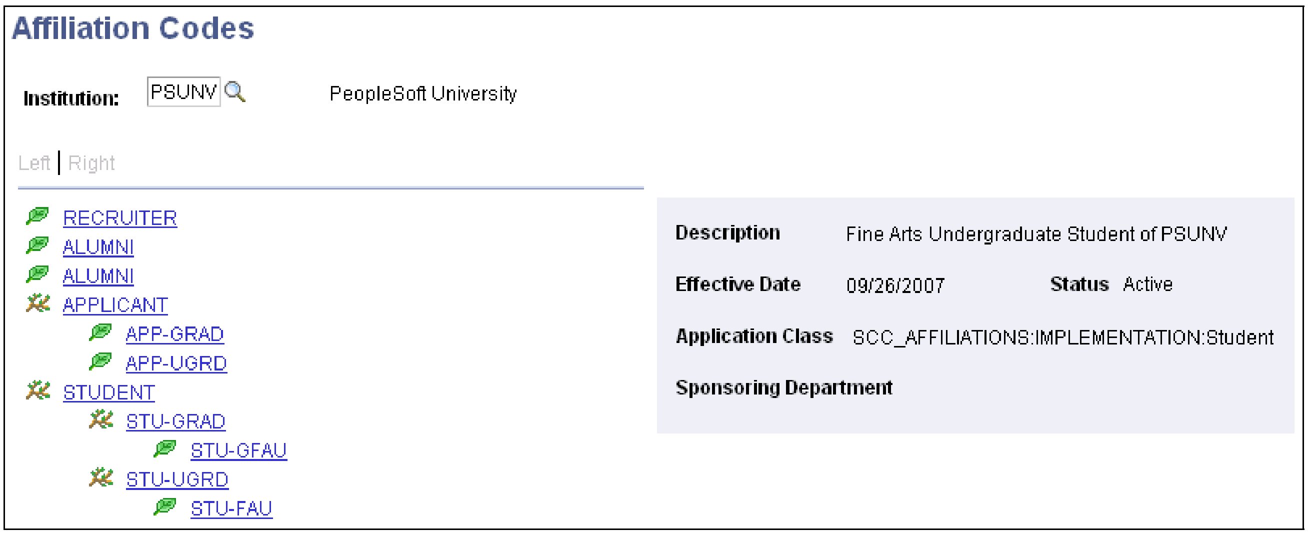
This section discusses how to review affiliation code details.

Page Used to View Affiliation Codes

Page Name	Definition Name	Navigation	Usage
Affiliation Codes	SCC_VIEW_AFFL_CODE	Campus Community, Affiliations, View Affiliation Codes	Review all affiliation codes defined for an institution, in a tree view and interactive format.

Reviewing Affiliation Code Details

Access the Affiliation Codes page (Campus Community, Affiliations, View Affiliation Codes).



Affiliation Codes page

The leaf icons indicate the lowest level of an affiliation hierarchy (in the example above, *RECRUITER* is a single-level hierarchy). Branch icons indicate that the hierarchy has children; those children have leaf icons.

When you select an affiliation code leaf or branch at any level of the tree, the system expands the tree and displays a pop-up message that provides additional details about the code.

Viewing Affiliation Exceptions

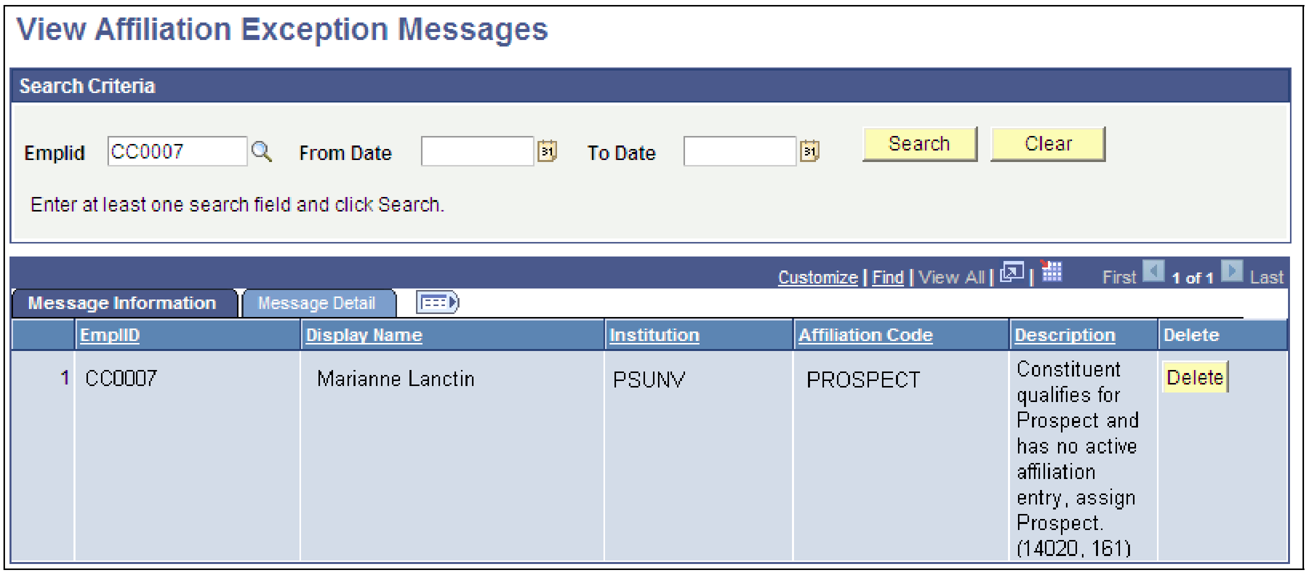
This section discusses how to review and purge affiliation exception messages.

Pages Used to View Affiliation Exceptions

Page Name	***Definition Name***	***Navigation***	***Usage***
View Affiliation Exception Messages	SCC_AFL_PRSN_MSGS	Campus Community, Affiliations, View Affiliation Exceptions	Review and purge affiliation exception message for constituents, based on a constituent ID or date range.

Viewing and Purging Affiliation Exception Messages

Access the View Affiliation Exception Messages page.



View Affiliation Exception Messages: Message Information tab

The search functionality on this page enables you to view Affiliation framework exception messages from the SOA log within Campus Community. The *PeopleSoft Campus Solutions Affiliations Developer's Guide* provides details about the "As of Date" rules that the system follows when applying or ending an affiliation.

Four possible affiliation exception messages can appear on this page:

Message Catalog Text	***Description***
(14020,159) Constituent doesn't qualify for [affiliation code] and affiliation is not currently active, no action taken	Person does not meet the criteria for the affiliation code, and the affiliation code is not currently active, so no additional action will be taken.
(14020,160) Constituent doesn't qualify for [affiliation code], but it is currently set as active, end dating [affiliation code].	The constituent does not meet the criteria for the affiliation code, but the affiliation code is current set as active. The Affiliation framework will end date the affiliation code.

Message Catalog Text	***Description***
(14020,161) Constituent qualifies for [affiliation code] and has no active affiliation entry, assign [affiliation code].	The constituent meets the criteria for the affiliation code, and currently does not have the affiliation code set as active. The Affiliation framework will assign the affiliation code.
(14020,162) Constituent qualifies for [affiliation code] and has the affiliation assigned and status set to active, no action.	The constituent meets the criteria for the affiliation code and currently has the affiliation code set as active. The Affiliation framework will take no additional action.

Click the Delete button to erase the message.

Select the Message Detail tab to see further information about the exception message.

Chapter 36

Managing Biographical Information

This chapter provides an overview of biographical information, lists prerequisites, and discusses how to:

- Manage names data.
- Manage addresses and phones data.
- Manage personal attributes information.
- Manage FERPA privacy controls.
- Manage relationships data.
- Enter emergency contact data.
- Track work experience.

Understanding Biographical Information

Personal information is personal data that distinguishes one individual from another. The most basic of this information is a person's biographical data, which includes name, address, gender, marital status, and date of birth.

When you manage many individuals in a database, you want to know and quickly access more than the basic information about them. With the personal information data pages, you can also enter and track an individual's various telephone numbers and addresses (street, email, and uniform resource locator [URL]), and you can maintain data about the individual's ethnicity, visa and permits, citizenship and passports, languages, relationships, religious preference, emergency contacts, and work experience.

You can enter and maintain different name types for an individual. With effective dating, you can also maintain and review the history of name changes for each type. For example, when the divorced Mrs. Edith Jones advises your institution that she has remarried and changed her last name to Bramowitz, you can maintain her preferred name, Edith Bramowitz; her former name, Edith Jones; and her maiden name, Edith Brown. Departments that need to know when these name changes occurred can determine that by reviewing the history of each name type.

You can also enter and maintain different address types for an individual. For example, you might want to enter an individual's home, business, mailing, and permanent address. You can update these addresses as needed and maintain the address change history. In addition to traditional addresses, many individuals have at least one email or web address and several telephone numbers. You can enter and review electronic addresses and phone numbers in your system. After you enter addresses data, you can run processes to apply or remove seasonal addresses, update linked addresses, and search for a specific address for an individual.

Use the pages described in this chapter to report personal attributes, including the ethnicity of students, staff, and constituents in your campus community. The United States government requires that students must be placed in at least one of a limited number of ethnic groups.

You can identify the reciprocal individual relationships that your institution wants to track. Reciprocal relationships include spouses, mother and daughter or mother and son, brother and brother or brother and sister, employer and employee, and so on.

You can use reciprocal relationships to associate an individual in your database with another individual inside or outside of your database. When you associate two individuals, you can set up joint communications for them and maintain one joint address to which to send the joint communication. For example, you can set up a joint communication addressed to Mr. and Mrs. Smith.

You can set the system to automatically verify the marital status that you enter on the Biographical Details Data page against the relationship that you select on the Relationships page. To set automatic marital status verification, select the marital status and associated relationship on the Relationship/Marital Status page that you want the system to verify. If the verification determines that the marital status of either individual is not the specified status for that relationship, a warning message appears, suggesting that you update the marital status on the Biographical Details page. For example, if you set the marital status of *Married* and the relationship of *Spouse*on the Relationships/Marital Status page, when you select the relationship of *Spouse* on the Relationships page, the system verifies that the marital status of each individual on the Biographical Details page is *Married.* If the marital status of either individual is different from *Married*, the system displays the warning message.

Note. Some default values for relationships are set on the Installation Defaults - Campus Community page including reciprocal relationships. When the Create Reciprocal Relationship check box is selected on the Installation Default - CC page, the system automatically updates the relationship record for both IDs when you enter and save information on pages in the Relationship component.

You can track which languages an individual can read, speak, or write and to what degree of proficiency. You can also identify the religious preference, if any, reported by an individual and track the religious preferences of your overall campus community. You can also set preferences for the language and method by which an individual wants to receive communications from your institution.

You can enter the names, addresses, and telephone numbers of people to contact when an individual has an emergency situation. You can enter as many contacts and as many phone numbers for each contact as the individual provides or as your institution requires.

You can use U.S. Standard Industry Classification (SIC) and Standard Occupational Classification (SOC) codes to identify and track data about an individual's work experience, including the name of the individual's former employer, employment begin and end dates, and the most current rate of pay.

You can enter or update most basic biographical data about an individual on the Biographical Details page when you create the personal record, or you can access pages described in this section to edit or update specific information. When you save information on the pages described in this section, the system writes it to the relevant maintenance tables and updates the same information on other pages where it appears, including the Biographical Details page. Detailed information about using the Biographical Details page to add or update a person is provided in the *Adding a Person in PeopleSoft Campus Solutions* section of this PeopleBook.

When you license PeopleSoft Campus Self Service, you can also present basic biographical information to students and faculty so that they can view and update their own information, which minimizes the need for your staff to enter and maintain the data.

Prerequisites

Before entering or updating basic biographical data, you must design and set up names, addresses, and other foundational elements of Campus Community. You must also set up basic elements for personal data management.

Managing Names Data

This section discusses how to:

- Enter name types for an individual.
- View name history.
- (NLD) Enter the name to report for GBA.

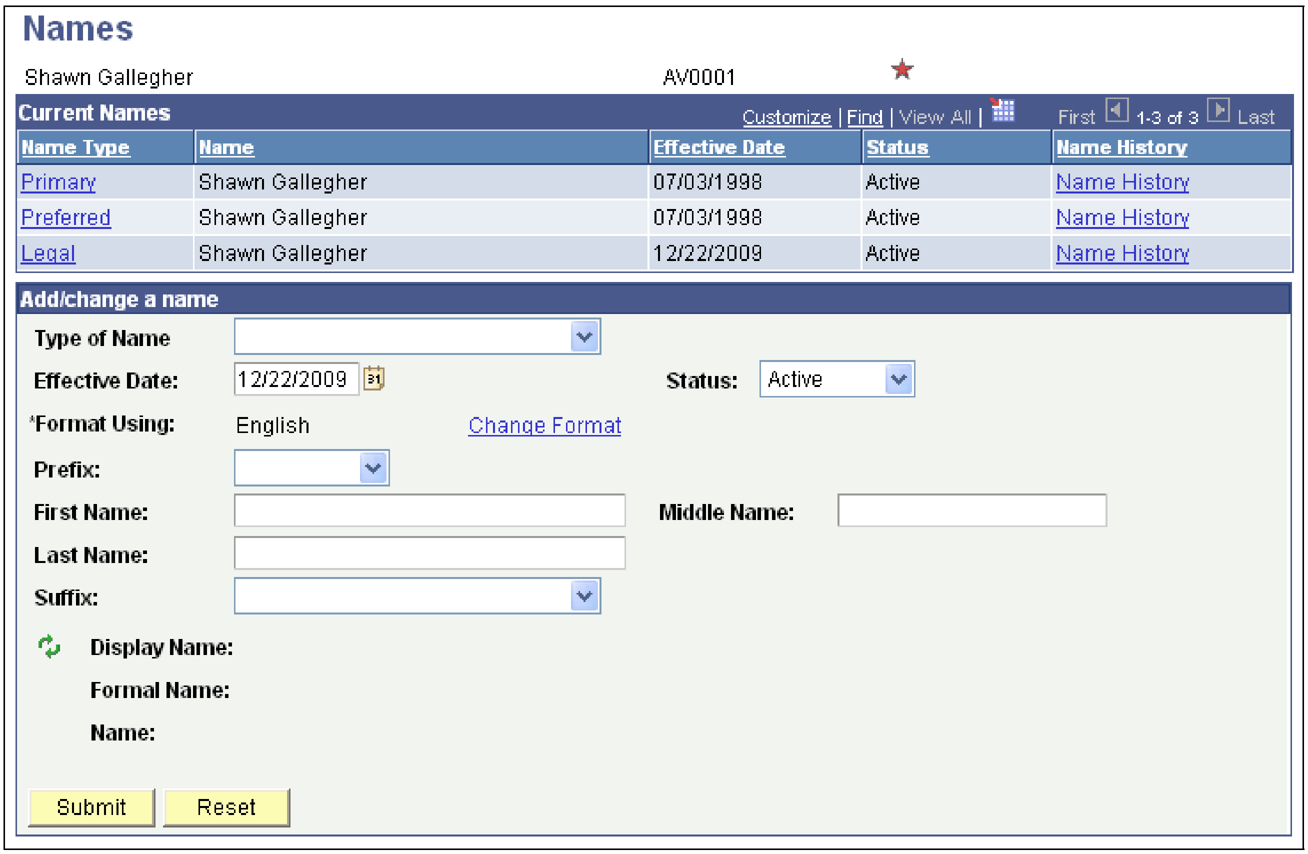
Pages Used to Manage Names Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Names	SCC_NAMES_89	• Campus Community, Personal Information, Biographical, Names • Campus Community, Personal Information (Student), Biographical (Student), Names • Student Recruiting, Student Recruiters, Personal Information, Names • Student Admissions, Application Entry, Personal Information, Names • Student Recruiting, Maintain Prospects, Personal Information, Names	View or create name types and data for an individual.
Name Type History	SCC_NAME_HIST_SEC	Click the Name History link for a name type on an individual's Names page.	View the history of an individual's name type and update or add a new effective date for that name type.

Page Name	Definition Name	Navigation	Usage
Names (NLD)	SSR_NAMES_NLD	• Personal Information NLD, Student GBA Names NLD • Click GBA Reporting Names in the Netherlands section of the Regional page in the Biographical Details component.	Enter an individual's name to report for GBA.

Entering Name Types for an Individual

Access the Names page (Campus Community, Personal Information, Biographical, Names).



Names page

Warning! You must click Submit to submit data that you enter on the Names page *before* you save the page. Saving the page without first submitting the data will clear the fields for which you entered values and data will be lost.

Current Names

Name Type

Displays the individual's current name types as links.

Click the link to view or update data for an existing name type. The system displays the associated data in the relevant fields.

The system displays the name format with the name fields previously entered for this name type and the Display Name, Formal Name, and Name fields at the bottom of the page, where you can add a new past or future effective-dated row for the name type.

Name

Displays the individual's name as it appears in the default display name format for the selected name type.

Name History

Click to access the Name Type History page, on which you can view the history of the name type.

To update the current name type for the individual, click the Name History link, add a new name row, specify the effective date and name format, and edit the related name fields.

Add/change a name

Use this area of the page to add or edit name information for the Name Type link that you selected at the top of the page.

Type of Name

Select the type of name, such as *Primary, Preferred, Legal,* or *Maiden,* to add or update for this individual.

Values for this field are set up on the Name Type Table page.

Format Using

Displays the name format currently used for this name type.

Change Format

Click to select a different name format to use.

Enterable fields appear based on the format that you select. For example, for the English name format, the prefix, first name, middle name, last name, and suffix fields appear.

Display Name, Formal Name, and **Name**

Displays the name formats to use throughout the system.

Display Name is the format to use in the heading of person pages.

Formal Name contains the individual's first name and last name with prefix.

Name displays the name as LastName, Suffix, comma, First Name, Middle Name.

 **(Refresh)**

Click to update the display name formats to reflect any changes made in any of the name fields.

Submit

Click to submit data *before* saving the page.

Submitting the data changes the data in the Current Names area so that you can view the changes, and clears all fields in the Add/change a name area.

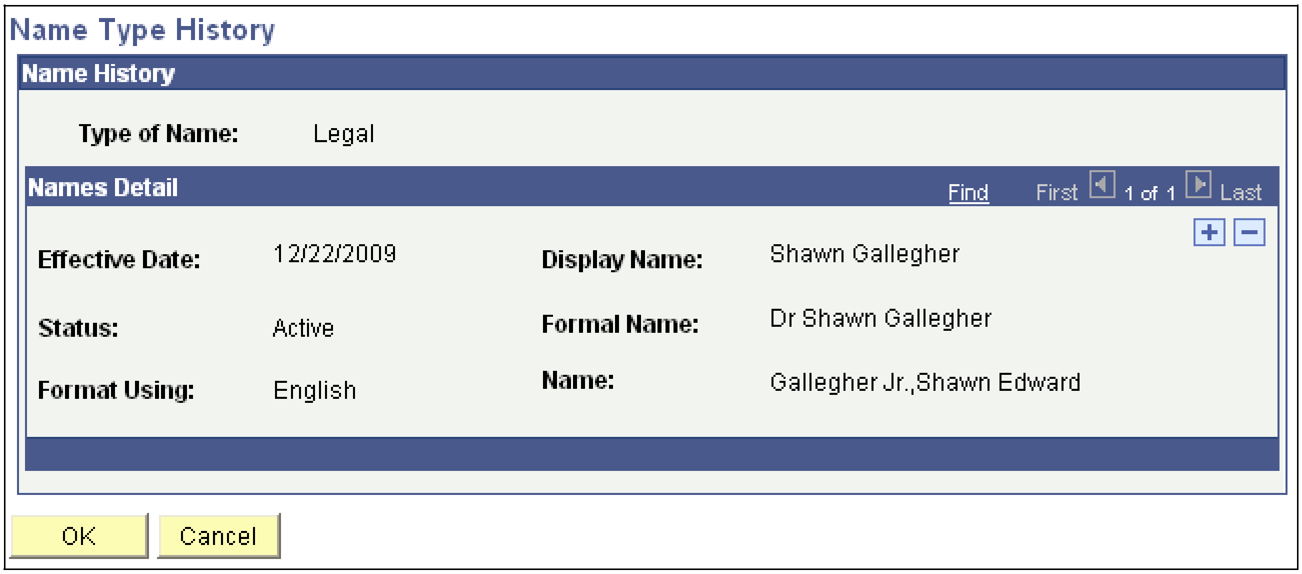
To save the changes to the database, you must click Save.

Reset

Click to clear all fields in the Add/change a Name area, which enables you to re-enter field values.

Viewing Name History

Access the Name Type History page (click the Name History link for a name type on an individual's Names page).

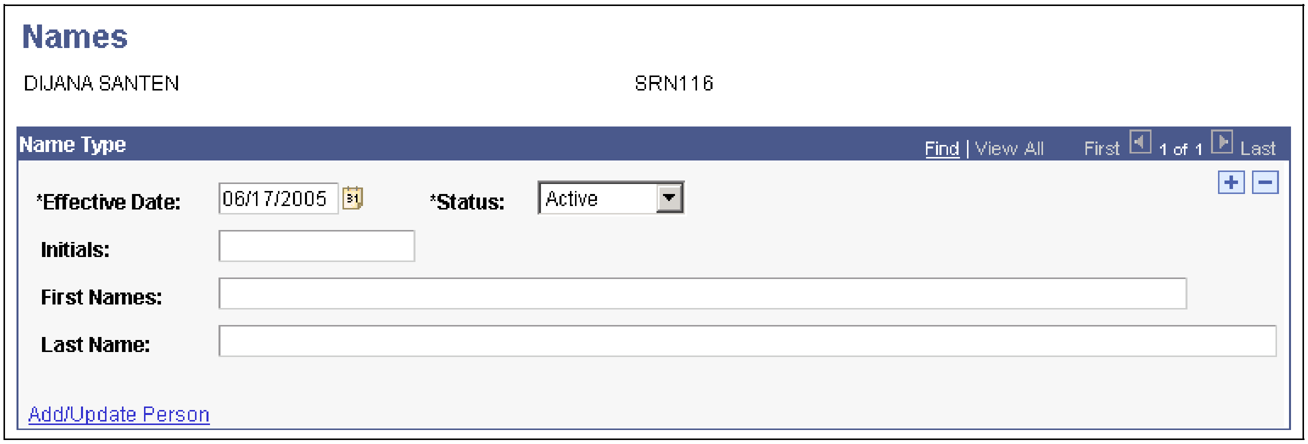


Name Type History page

The system displays the history of the selected name type. You can view or add data as permitted by the mode (add, update/display, include history, or correct history) that you select.

(NLD) Entering the Name to Report for GBA

Access the Names page (Personal Information NLD, Student GBA Names NLD).



Names page

Enter the individual's name to report for GBA.

Managing Addresses and Phone Data

This section provides an overview of managing addresses, lists prerequisites, and discusses how to:

- Enter addresses for an individual.
- Link addresses.
- Enter electronic address data.
- Enter seasonal addresses.
- Process seasonal addresses.
- Update linked addresses.
- Search for addresses.
- Enter phone data.

Understanding Address Management

Some of your faculty or constituents might routinely relocate and work from a different address. For example, a student might go to his family's ski lodge every winter break or a staff member might volunteer out of state each summer. Using the Seasonal Addresses feature, you can track temporary addresses to stay in contact with individuals while they are away. You enter the individual's seasonal address data with the appropriate begin and end dates. Then you run the seasonal addresses process to apply or remove the address, based on the begin and end dates. You can run the process to apply the seasonal address for a specific individual or you can run it to apply or remove all seasonal addresses between certain start and end dates.

When you update an address for a campus location or organization, the campus location or organization address for individuals linked to that location or organization are not changed in your database until you run the Update Linked Addresses process. When you run the process, the system locates all the individuals with whom that campus location or organization is linked and updates the changed address there as well. For example, when you change an organization's address and run the Update Linked Addresses process, the system locates each of the individuals who are linked to that organization and changes the organization's address.

You can search for addresses for individuals. You can search on address usage, email type, or address type. For example, if you want to send an email message to an individual at his dorm, you can search on the email type of *Dormitory.* If you need to send a billing notice, you can search on the address type of *Billing* or search on the address usage of *Billing.* However, if no address type of *Billing* exists for the individual, you will get no results. If your institution has assigned address usages, use one of the address usage search orders (in this case, Billing, Mailing, Home, Permanent) to have the system search for and find the first appropriate address.

Note. The system searches only on active addresses.

You can view a list of all addresses in your system for an individual, which includes all address types that have been entered for the individual. It also includes the individual's current addresses, any previous addresses that are now inactive, and any addresses that are set to become active in the future.

Prerequisites

Before managing seasonal or linked addresses or before searching for addresses in your system, enter addresses and address types for the individual.

Pages Used to Manage Addresses

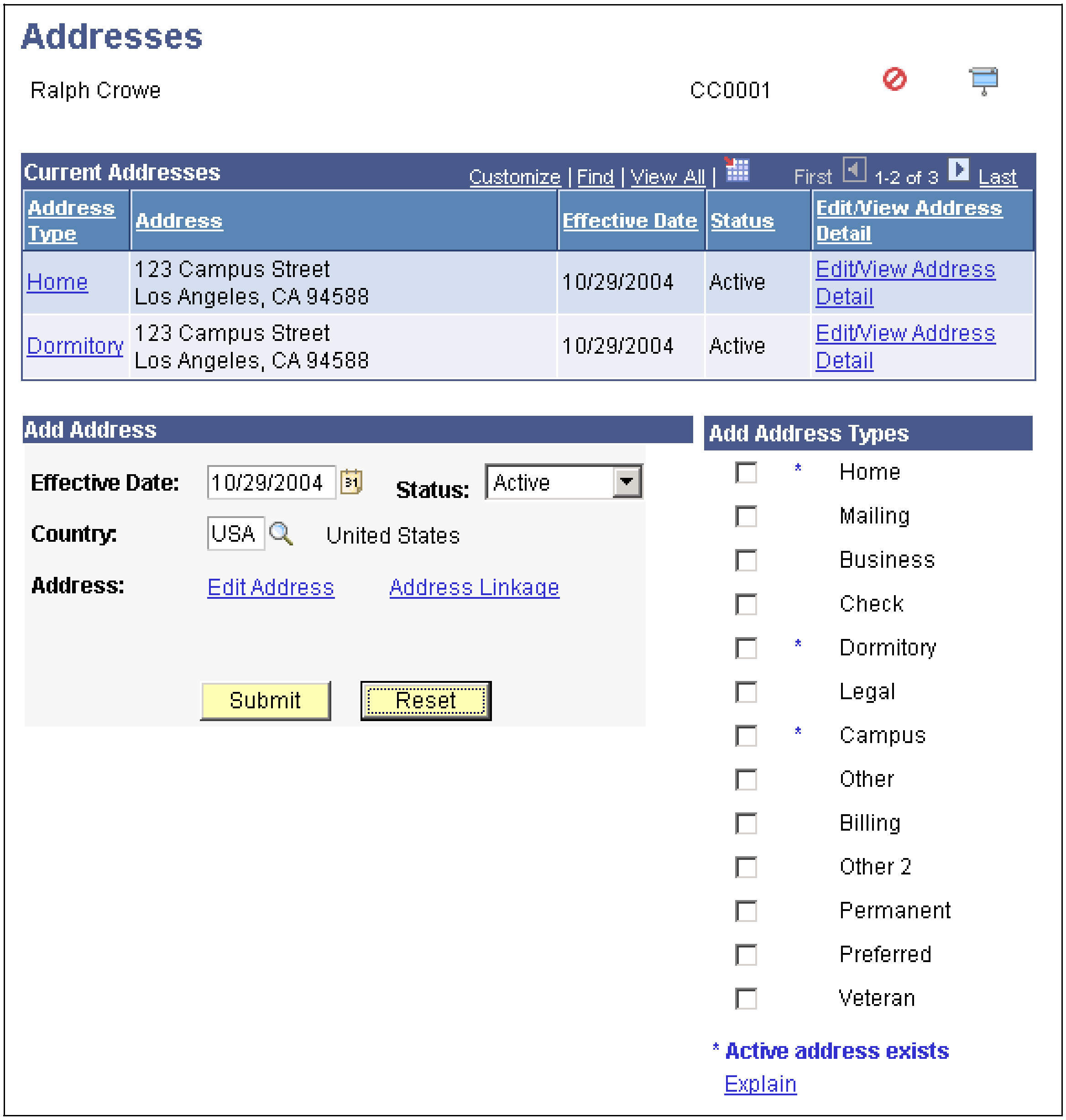
Page Name	***Definition Name***	***Navigation***	***Usage***
Addresses	SCC_BIO_DEMO_ADDR	• Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Addresses	Enter or review an individual's address types and data.
Address History	SCC_ADDR_HIST_SEC	Click the Edit/View Address Detail link for an address type in the Current Addresses area of the Addresses page.	View the history of a specific address type for an individual.

Page Name	***Definition Name***	***Navigation***	***Usage***
Edit Address	EO_ADDR_XXX_SEC (where XXX = the country code)	• Click the Edit Address link on the Addresses page or the Seasonal Addresses page. • Click the Update Addresses link on the Address History page.	If you access the Edit Address page by clicking Edit Address, enter address data for the specified address type. If you access the Edit Address page by clicking Update Addresses, edit or update any address data associated with the individual.
Electronic Addresses	E_ADDR_PERS	• Campus Community, Personal Information, Biographical, Addresses, Electronic Addresses • Contributor Relations, Constituent Information, People, Biographic Information, Electronic Addresses • Student Recruiting, Student Recruiters, Personal Information, Electronic Addresses • Student Admissions, Application Entry, Personal Information, Electronic Addresses	Enter or review an individual's email address and URL data.
Seasonal Address	CC_ADDR_SEASONAL	Campus Community, Personal Information, Biographical, Addresses, Seasonal Address	Enter a seasonal address for an individual.
Process Seasonal Addresses	RUNCTL_SEASNL_ADDR	Campus Community, Personal Information, Biodemo Processes, Apply Seasonal Addresses	Run the process to apply or remove the designation of *Seasonal Address* to specified addresses in the Current Addresses area of the Addresses and Address History pages.
Address Linkage	SCC_ADDRSA_LNK_SEC	Click the Address Linkage link in the Edit Address area of the Addresses page or the Address History page.	Link an address type to the location of a campus or an organization.

Page Name	Definition Name	Navigation	Usage
Update Linked Addresses	RUNCTL_CCADDLINK	Campus Community, Biodemo Processes, Update Linked Addresses	Run the process to update linked addresses throughout your system.
Address Search	ADDRESS_SRCH	• Campus Community, Personal Information, Address Search • Contributor Relation, Constituent Information, People, Biographic Information, View Addresses	Search for a specific address for an individual.
Phone Numbers	PHONE_PERS	Campus Community, Personal Information, Biographical, Addresses, Phones	Enter or review an individual's telephone numbers.

Entering Addresses for an Individual

Access the Addresses page (Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses).



Addresses page

Information that you enter here is the same as the address data that you enter on the Biographical Details page when you create a personal record. When you save the data (either there or here), the system updates the address data in both places.

Current Addresses

If the individual has current addresses in the database, this area of the page shows the current address types and the associated data. If the individual does not have a current address, the text *No current addresses exist* appears instead.

Address Type	Displays the individual's current address types as links. Click the link to view or update data for the address type. The system displays values for the current address in the relevant fields. Displaying the address data enables you to copy it from one address type to another.
Edit/View Address Detail	Click to access the Address History page, on which you can view the history of the address type. To update the current address type for the individual, click the Edit/View Address Detail link, add a new address row, specify the effective date and address format, and edit the related fields.

Add Address

Effective Date	Enter the date on which the address is active. Enter addresses in the chronological order of their effective dates. Enter the earliest dated address first and the future-most dated address last.
Country	Enter the country code for the address format to use for the individual. The system displays the fields required for that country as defined on the Country Table - Address Format page.
Edit Address	Click to access the Edit Address page, on which you can enter new address data in the specified format.
Address Linkage	Click to access the Address Linkage page, on which you can link an address type to a campus location or organization location.

Add Address Types

A particular address often applies to more than one address type for an individual. For example, an individual's dormitory, campus, and billing addresses might be the same.

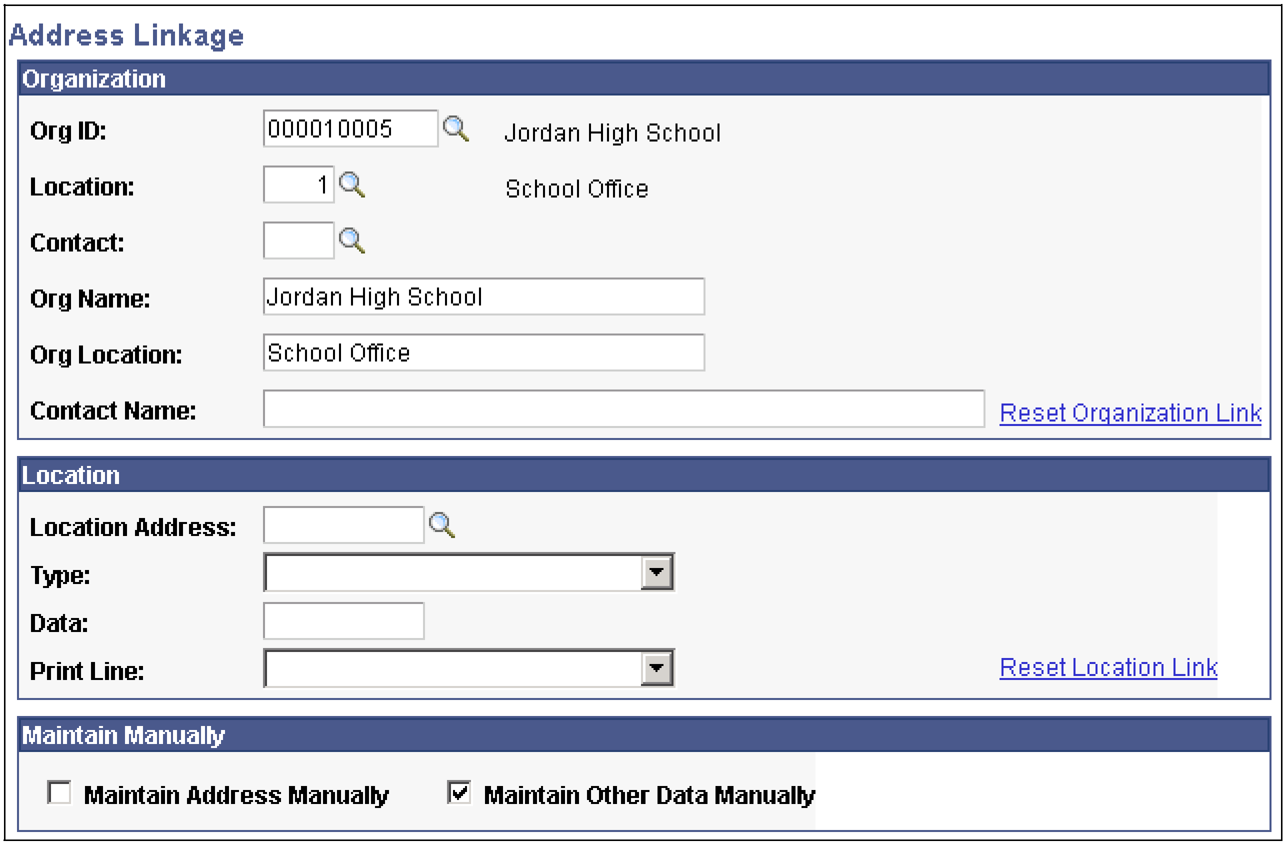
To copy the address, effective date, and status from one address type to other address types, select the address types to which to assign the data, click Submit, and then click Save.

Address Type	Click the current address type such as *Dormitory*,*Campus* or *Billing*, to copy. The system displays the associated address data beneath the Edit Address link in the Add Address area of the page. To make changes to the data, click Edit address and make the changes.
* (blue asterisk to the left of an address type)	Indicates that the address type exists and that it has a current or future-dated address with a status of *Active.* Be sure that you want to add a new effective-dated row to the existing data before selecting the address type.

Explain	Click to display an explanation of the marks that indicate the successful or unsuccessful creation of an address type. **Note.** A green check mark indicates the successful creation of an address type. A red X appears if you try to create an address type that causes effective dates to become out of sync for a specific address type. For example, a red X appears if the address type that you are adding already has an existing duplicate effective date, or when an earlier effective-dated address currently exists for the address type.
Submit	To copy the address data to each of the selected address types, click Submit. A green check mark appears next to each address type to which the data is successfully copied and the new or updated addresses appear in the Current Address area of the page. The addresses are not written to the Addresses Table until you click Save. **Note.** When you create multiple address types from one source address, you can have a mixture of successful and unsuccessful outcomes (green check mark or red X respectively). The data only from successful outcomes appear in the Current Address area.
Edit/View Address Detail	Click to access the Address History page, on which you can change the effective date and status for any newly submitted address and address type before you save it. You can also add a new effective-dated row for the selected address type.
Reset	Click to clear address information in the Add Address and Add Address Type areas. Doing so enables you to enter different data, either manually or by clicking the Address Type link to copy address data from a current address.

Linking Addresses

Access the Address Linkage page (click the Edit/View Address Detail link for an address type in the Current Addresses area of the Addresses page).


Address Linkage

Organization

Org ID: 000010005 Jordan High School

Location: 1 School Office

Contact:

Org Name: Jordan High School

Org Location: School Office

Contact Name: Reset Organization Link

Location

Location Address:

Type:

Data:

Print Line: Reset Location Link

Maintain Manually

Maintain Address Manually   Maintain Other Data Manually

Address Linkage page

This page enables you to specify the addresses to link. It also enables you to set linked data to manual maintenance so that the Update Linked Addresses process (or any other automatic update process) will bypass the information.

Organization

Enter information to identify the organization address to which you want to link.

Location

Enter information to identify the location address to which you want to link.

Location Address and **Type** — Enter the location address and specify the address type to which to link.

Data and **Print Line** — Enter address data to print for this location and specify on which address line to print it.

Maintain Manually

Maintain Address Manually — Select to maintain the address manually and have the system bypass it in the update linked addresses process or other automatic update processes.

Maintain Other Data Manually

Select to maintain other data (from Location or Organization page areas) manually and have the system bypass it in the update linked addresses process or other automatic update processes.

Entering Electronic Address Data

Access the Electronic Addresses page (Campus Community, Personal Information, Biographical, Addresses, Electronic Addresses).

Electronic Addresses page

Note. Information that you enter here is the same as the email address data that you enter from the Biographical Details page when you create a personal record. When you save data here, the system updates the same email address data on the Biographical Details page.

Email Information

Email Type

Select the type, such as *Home, Business,* or *Mailing,* that describes this email address.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Email Address

Enter the individual's email address.

Preferred

Select to indicate the individual's preferred email address, which is the one to use first when contacting this individual. You may select only one preferred email address for an individual.

URL Information

Type

Select the type (such as *Home*, *Business*, or *Mailing)* that describes this electronic address or URL.

URL Address

Enter the individual's URL or home page address.

Entering Seasonal Addresses

Access the Seasonal Addresses page (Campus Community, Personal Information, Biographical, Addresses, Seasonal Address).

Seasonal Addresses page

Address Type

Select the type of address that is seasonal for this individual. Only the address types for which the individual has data are available.

Note. If the main address data for the address type of this seasonal address is removed, an error message is shown similar to "Business Seasonal Address is invalid - no Active Business Address on file. Seasonal Addresses may only be added for active address types." You can recreate the main address information for this address type, select a different address type for the seasonal address, or remove it.

Start Date

Indicate the date when the seasonal address begins to apply.

End Date

Indicate the date when the seasonal address ceases to apply. When the end date occurs, the system automatically increases the start and end dates by one year and resets the address for the next year.

Country

Enter the country formatting to use for this address.

When you exit the Country field, the address fields appear in the format for the selected country as defined on the country Address Format page.

Processing Seasonal Addresses

Access the Process Seasonal Addresses page (Campus Community, Personal Information, Biodemo Processes, Apply Seasonal Addresses).

Process Seasonal Addresses page

Select One ID

Select this check box to apply or remove seasonal addresses for one individual only. You must specify the individual's ID in the ID field.

If you do not choose *Select One ID,* the system applies or removes seasonal addresses for all IDs for which seasonal address data exists.

Use Start Date Range

Select this check box to indicate that all seasonal addresses beginning within the specified date range should be applied or removed.

Use End Date Range

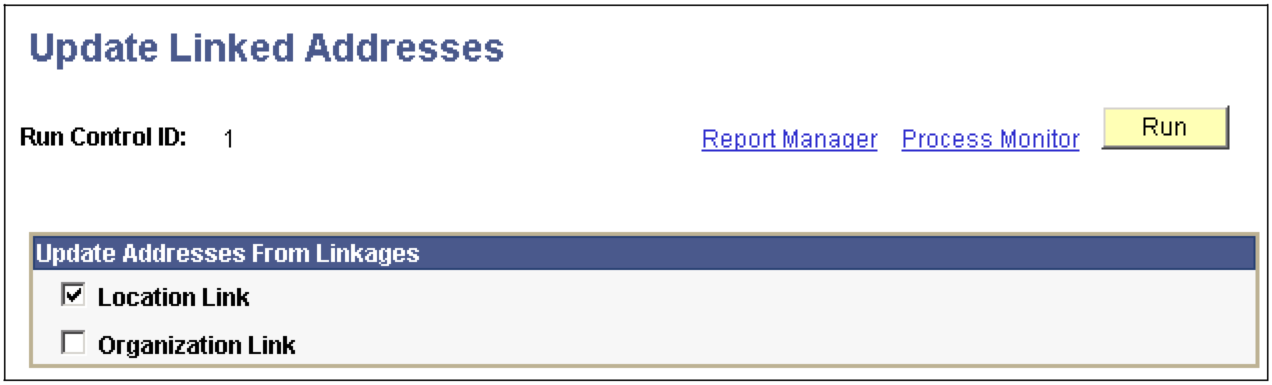
Select this check box to indicate that all seasonal addresses ending within the specified date range should be applied or removed.

Note. You must enter either a start date range, an end date range, or both. If the individual has multiple seasonal addresses, consider specifying a date range long enough to include all of them in the search.

If you specify only one date in a range, the system limits the search to seasonal addresses that begin or end, respectively, on that specific date.

Updating Linked Addresses

Access the Update Linked Addresses page (Campus Community, Biodemo Processes, Update Linked Addresses).



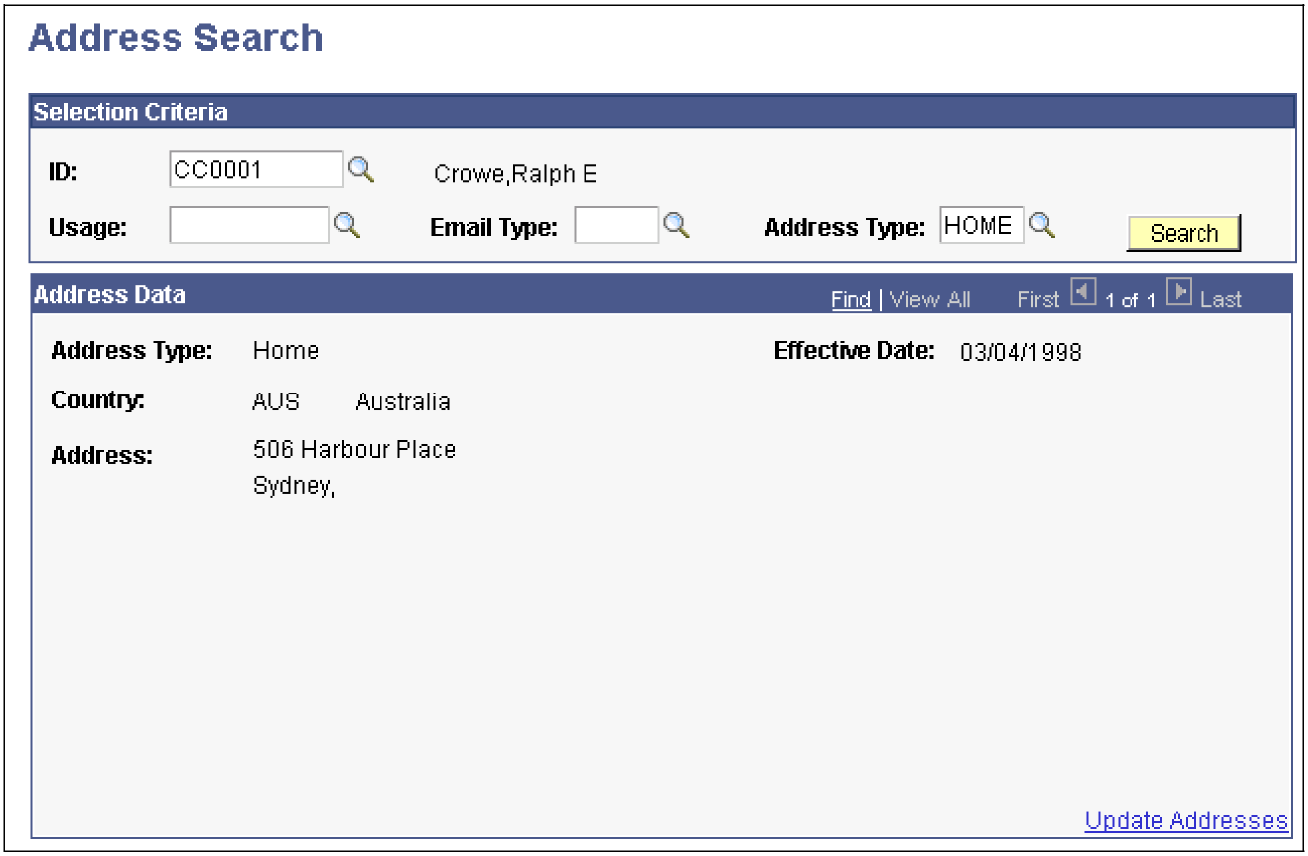
Update Linked Addresses page

Location Link Select this check box to indicate that the process should update all addresses linked to locations.

Organization Link Select this check box to indicate that the process should update all addresses linked to organizations.

Searching for Addresses

Access the Address Search page (Campus Community, Personal Information, Address Search).



Address Search page

Selection Criteria

ID

Enter the ID of the individual whose address you want to find.

Usage

Enter the type of address usage or search order for the system to use in the search.

All address usages on the Address Usage page are available.

Email Type

Enter the type of email address, if any, for which the system should search, such as *Home*, *Dorm*, or *Business.*

Only the existing email types for this individual are available. If no email data exists for the individual, no email types are available.

Address Type

Enter the type of street address for which the system should search, such as *Home*,*Dorm*, or *Business.*

All address types are available. If no data of that type exists for the individual, no results are returned.

Search

Click to launch the search.

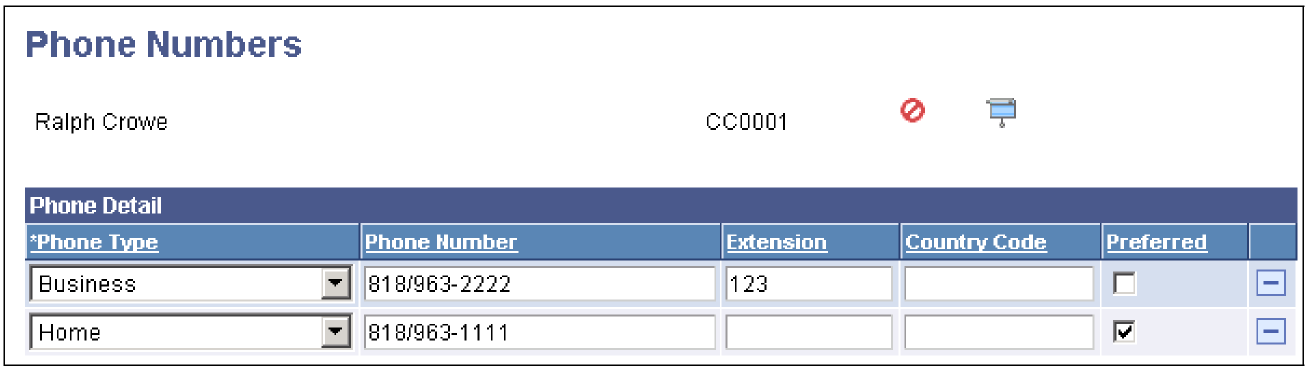
Address Data

The system displays the search results in this area.

Update Addresses	Click this link to access the Addresses page on which you can edit or update any address data associated with the individual.

Entering Phone Data

Access the Phone Numbers page (Campus Community, Personal Information, Biographical, Addresses, Phones).



Phone Numbers page

Note. Information that you enter here is the same as the phone number data you enter on the Phone Detail page. When you save data here, the system updates the same phone number data on the Phone Detail page.

Phone Type	Select the type, such as *Home, Business,* or *Mailing*) that describes this telephone number. Values for this field are delivered with your system as translate values. You can modify these translate values.
Phone Number	Enter the telephone number, including area code, for this individual.
Extension	Enter the individual's direct extension, if any.
Country Code	Enter the country code, if required to complete the call.
Preferred	Select to indicate that this is the individual's preferred phone number, and the one to use first when contacting this individual. You can select only one preferred phone number for an individual.

Managing Personal Attributes Information

This section provides an overview of the personal attribute deceased label, lists prerequisites, and discusses how to:

- Enter ethnicity information.
- Process ethnicity information updates.
- Enter languages information.
- Enter communication preferences
- Enter religious preferences.
- Enter date of death and other decedent data.
- (AUS) Enter student data.

Understanding the Personal Attribute Deceased Label

When an individual dies, you should apply the deceased label to all pages about that individual. Then, when users encounter a page with the word *DECEASED* at the top, they can determine whether to continue or suspend their transactions for that individual.

You can apply the label using either of the following methods. In both methods, when you save the individual's page, the system displays the word *DECEASED* at the top of the pages.

- To display the deceased label and not enter any other decedent data (for example, place of death and death certificate number), assign your institution's deceased service indicator to the decedent.

  The service indicator sets the deceased label to display. You can use this method regardless of whether you know the individual's date of death.

- If you know the individual's date of death, you can enter that date on the Decedent Data page along with other decedent data, and then save the page.

  You can use this method to apply the deceased label *only* if you know the date of death.

For example, you might receive confirmation that Gloria is deceased. You want to apply the deceased label to all pages about her as soon as possible to alert users. However, you have not received a copy of the death certificate or official confirmation of her date of death. Because you do not know when she died, you could assign her your institution's deceased service indicator, which is the one that is set to display the deceased label.

You can verify that the label is applied by accessing any page about the decedent. The word *DECEASED* appears at the top right of the page.

All of the decedent's data remains in your database until your system administrator deletes the decedent's ID.

Prerequisites

Before you can enter personal attributes data, you must define language codes, and religious preferences codes in your system. Before you can apply and manage FERPA privacy control, you must establish FERPA privacy control fields. Before you can allow students to identify publications for which they release FERPA privacy restrictions, you must set up your institution's publications.

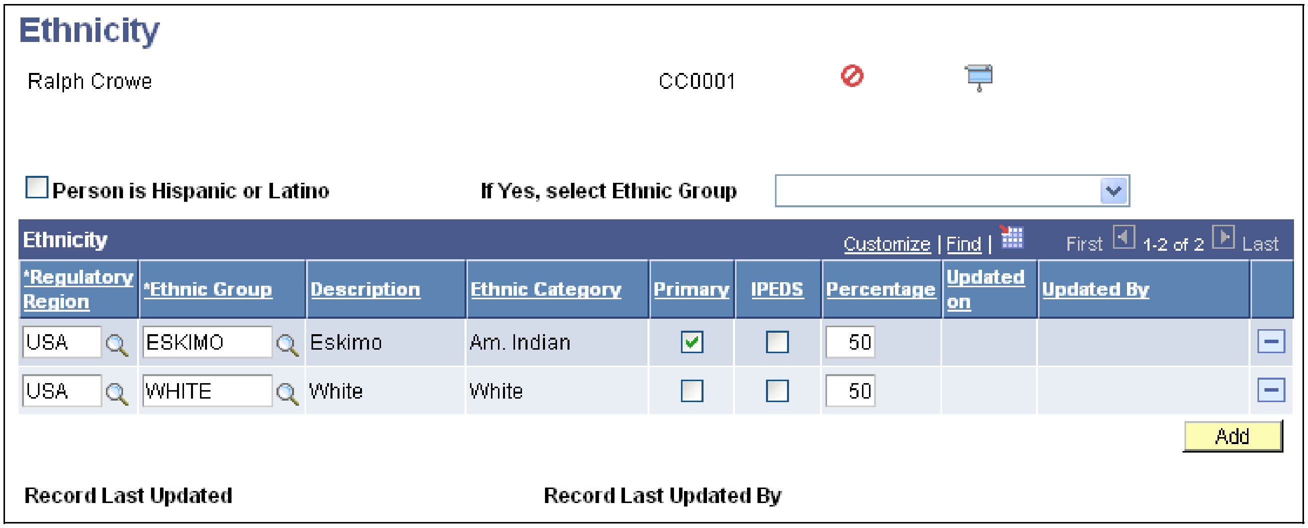
Pages Used to Manage Personal Attributes Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Ethnicity	ETHNICITY_DETAIL	Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity	Enter or review an individual's ethnicity data.
Ethnicity Detail Update	SCC_ETH_UPDATE	Campus Community, Personal Information, Biodemo Processes, Ethnicity Detail Update	Process ethnicity-related updates to person records in batch.
Languages	SCC_LANGUAGES	• Campus Community, Personal Information, Biographical, Personal Attributes, Languages • Student Recruiting, Student Recruiters, Personal Information, Languages • Student Recruiting, Maintain Prospects, Personal Information, Languages • Student Admissions, Application Entry, Personal Information, Languages	Enter and track an individual's language abilities.
Communication Preferences	SCC_COMM_PREF	Campus Community, Personal Information, Biographical, Personal Attributes, Communication Preferences	Enter an individual's preferred language and method for receiving communications (applies to communication generated by Comm Gen only).

Page Name	Definition Name	Navigation	Usage
Religious Preferences	RELIGIOUS_PREF	• Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences • Contributor Relations, Constituent Information, People, Personal Attributes, Religious Preference	Enter data to identify an individual's religious preference.
Decedent Data	SA_DECEASED_DATA	• Campus Community, Personal Information, Biographical, Personal Attributes, Decedent Data • Contributor Relations, Constituent Information, People, Personal Attributes, Decedent Data	Enter the date of death and other data about the decedent.
Student Data AUS	SSR_STDN_DATA_DEST	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS, Student Data AUS	Enter DEST information regarding a student's prior programs, including values related to TAFE, secondary school, and postgraduate programs.

Entering Ethnicity Information

Access the Ethnicity page (Campus Community, Personal Information, Biographical, Personal Attributes, Ethnicity).



Ethnicity page

For institutions with *USA* as an installed country, the following fields appear for editing:

Person is Hispanic or Latino

Select this check box to indicate whether the person is of Hispanic or Latino origin.

For further information on guidelines for defining if person is Hispanic or Latino, see http://nces.ed.gov/statprog/2002/std1_5.asp.

Note. You must select this check box if a row exists in the grid that indicates Hispanic origin.

If yes, Select Ethnic Group

If you selected the Person is Hispanic or Latino check box, then select an ethnic group code to further refine the person's ethnicity. When you select a value, row changes occur as follows:

- If no value exists in the drop-down list and you select a value that does not currently exist on the record, the system inserts a new row into the grid.
- If a value exists in the drop-down and that value exists in the grid, when you select a new value from the drop-down, the system updates the existing row.
- If a value exists in the drop-down and blank is selected from the drop-down, nothing affects existing rows.
- If the drop-down value is blank and you select a value that already exists in the grid, nothing happens to the existing rows.

Primary

Select this check box to indicate with which ethnic group the person most directly identifies.

IPEDS

Select this check box to indicate that the data has been submitted by a reliable source, such as application data or self service, in response to the IPEDS questions.

The following fields appear for all customers:

Ethnic Group

This field allows you to select multiple ethnic backgrounds.

Click the Add button to add more than one ethnic group.

Ethnic Category

The system populates this field based on the value in the EEO Ethnic Group field for U.S. regulatory region ethnic groups or the Ethnic Category for ethnic groups tracked for other regulatory regions.

For any ethnic group codes with a regulatory region of USA, this field should always map to one of these five races:

- American Indian or Alaska Native.
- Asian.
- Black or African American.
- Native Hawaiian or Other Pacific Islander.
- White.

For further information on guidelines for mapping ethnic group codes to the five races, see http://nces.ed.gov/statprog/2002/std1_5.asp.

Percentage

Indicate the share of 100 of which this person derives his or her ethnicity. The system displays a warning if you enter an amount over 100.

Note. Collecting this information is optional.

Last Updated, Updated By

Indicates when the ethnicity data was last created or changed, and by whom. The system updates these fields when you save the page. The system stores the OPRID of the user and displays the name of the user.

Record Last Updated

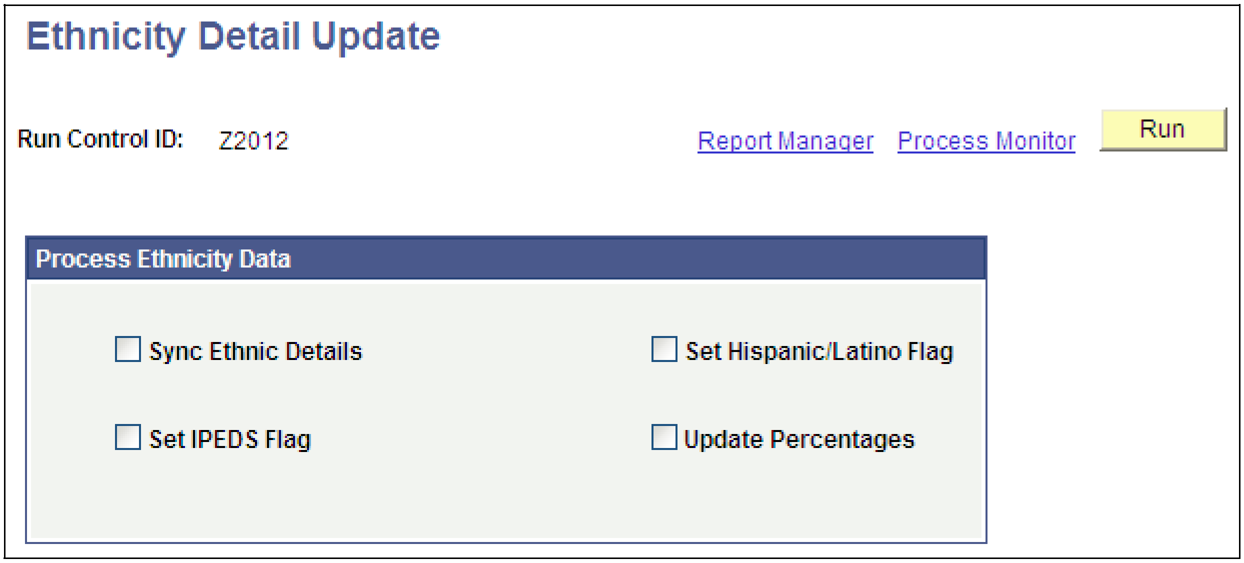
This field displays the date and time of the most recently added row in the grid.

Record Last Updated By

This field displays the name of the last user to update any row of the grid.

Processing Ethnicity Information Updates

Access the Ethnicity Detail update page (Campus Community, Personal Information, Biodemo Processes, Ethnicity Detail Update).



Ethnicity Detail Update page

If your institution chooses not to resurvey your population, you can use the check boxes on this page to update ethnicity record attributes in batch. Select any combination of the four check boxes.

Sync Ethnic Details

Select this check box to instruct the system to search for all rows in the DIVERS_ETHNIC table without a corresponding row in ETHNICITY_DTL and add a row, if one does not exist.

Select this check box to instruct the system to search for all rows in ETHNICITY_DTL without a corresponding row in DIVERS_ETHNIC and delete them.

Set IPEDS Flag

Select this check box to instruct the system to set the ETHNICITY_DTL.ETH_VALIDATED flag on ethnicity records to "Y", meaning that your institution considers the records valid for IPEDS requirements. The system also updates corresponding audit fields on the record.

Set Hispanic/Latino Flag

Select this check box to instruct the system to search for all DIVERS_ETHNIC rows with an EEO Ethnic Category = 3 'Hispanic' that are not set to "HISP_LATINO = Y", and set them to "Y." The system also updates corresponding audit fields on the record.

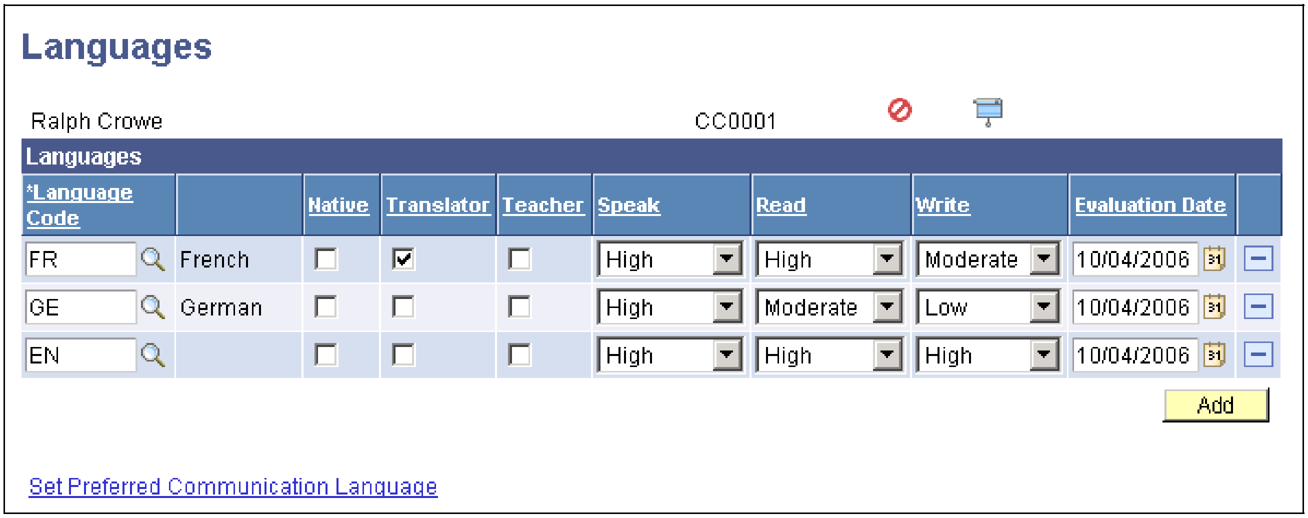
Update Percentages

Select this check box to instruct the system to search ETHNICITY_DTL records for fractional ethnicity data (such as 2/5) and convert it to a percentage (such as 40%) or to convert zero percentages to a Numerator = 0 and a Denominator = 100. The system also updates corresponding audit fields on the record.

Click the Run button to initiate the process. Review the results log within Process Scheduler that identifies which option was run and how many records were updated.

Entering Languages Information

Access the Languages page (Student Recruiting, Student Recruiters, Personal Information, Languages).



Languages page

Language Code — Enter the language that this individual speaks, reads, or writes.

Native — Select this check box to indicate that this is the individual's native or primary language.

Translator — Select this check box to indicate that the individual can translate or interpret this language.

Teacher — Select this check box to indicate that the individual can teach or has taught this language.

Speak — Select the level of proficiency, such as high, medium, or low, with which the individual can speak this language.

Read — Select the level of proficiency, such as high, medium, or low, with which the individual can read this language.

Write — Select the level of proficiency, such as high, medium, or low, with which the individual can write this language.

Evaluation Date — Enter the date on which the individual's levels of proficiency in this language were evaluated, reported, or entered.

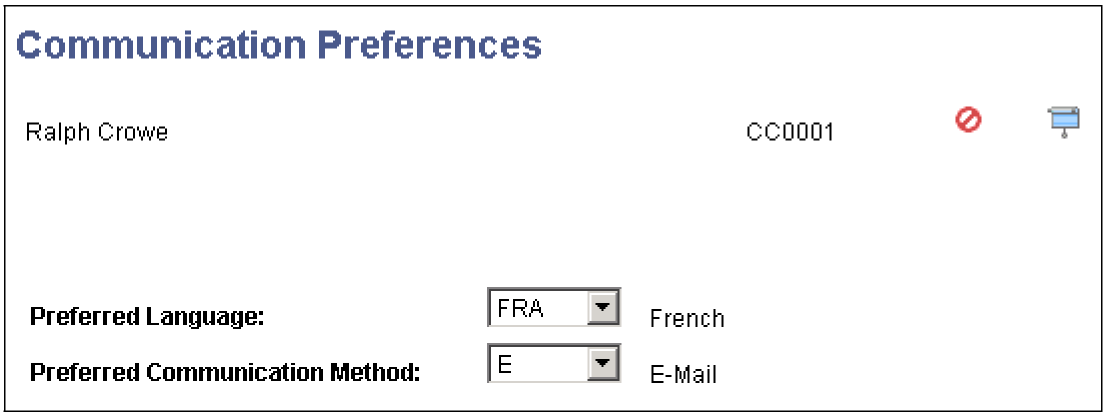
Set Preferred Communication Language

Appears only if the Support multiple languages check box is selected on the Installation Default - CC (installation default - Campus Community) page.

Click to transfer to the Communication Preferences page where you can specify the language in which the student prefers to receive communications from you.

Entering Communication Preferences

Access the Communication Preferences page (Campus Community, Personal Information, Biographical, Personal Attributes, Communication Preferences).



Communication Preferences page

If your institution supports multiple languages and multiple methods, you can enter an individual's communication preferences so that the Communication Generation process will produce correspondences to that individual accordingly.

Note. Communication preferences apply to the Communication Generation process only. They do not apply to the Letter Generation process.

Preferred Language

Enter the language in which the individual prefers to receive communications from your institution.

Only the languages that your institution supports and selects on the Installation Default - CC (installation default Campus Community) page are available.

Preferred Communication Method

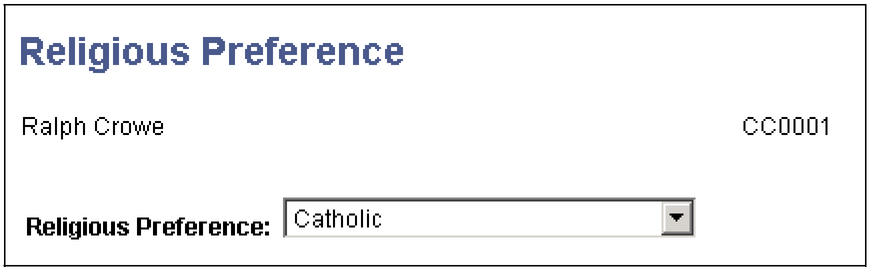
Enter the method by which the individual prefers to receive correspondence from your institution.

Only the methods that your institution supports and selects on the Installation Default - CC (installation default Campus Community) page are available.

Note. Currently, the Communication Generation process supports only the methods of *Email* and *Letter*.

Entering Religious Preferences

Access the Religious Preference page (Campus Community, Personal Information, Biographical, Personal Attributes, Religious Preferences).

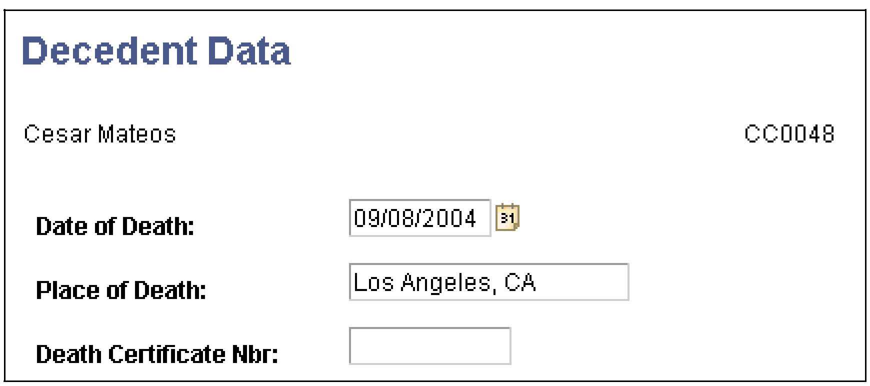


Religious Preference page

Religious Preference Select the individual's stated religious preference.

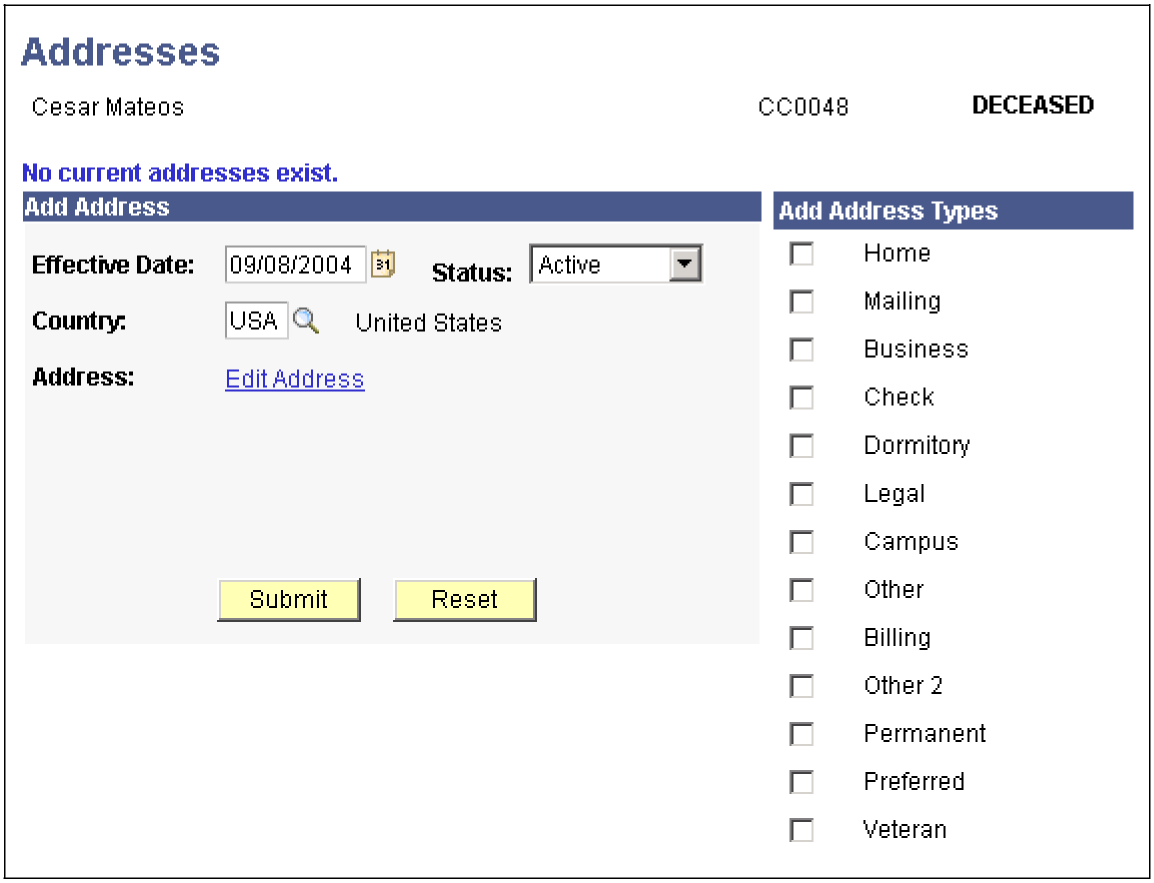
Entering Date of Death and Other Decedent Data

Access the Decedent Data page (Campus Community, Personal Information, Biographical, Personal Attributes, Decedent Data).



Decedent Data page

Note. Only the date of death is required to display the deceased label for the individual throughout your system.



Example of the Addresses page with the Deceased indicator displayed

Date of Death

Enter the individual's date of death. You can enter either the official date of death or the date on which your institution was notified of the death, depending on your institution's requirements.

When you enter a date and save the page, the system displays the word *DECEASED* at the top of pages about this individual throughout your system. If you do not enter a date, the deceased label does not appear.

Note. If you do not know the date of death, use the Service Indicator page to assign your institution's deceased indicator to this individual.

If, after you enter a date of death and save the Decedent Data page, you decide that you do not want the deceased label to appear on pages for this individual, return to the Decedent Data page, highlight and delete the date, and then save the page with an empty Date of Death field. The deceased label no longer appears.

Place of Death

Enter the place (city, state, county, or country) where the individual died.

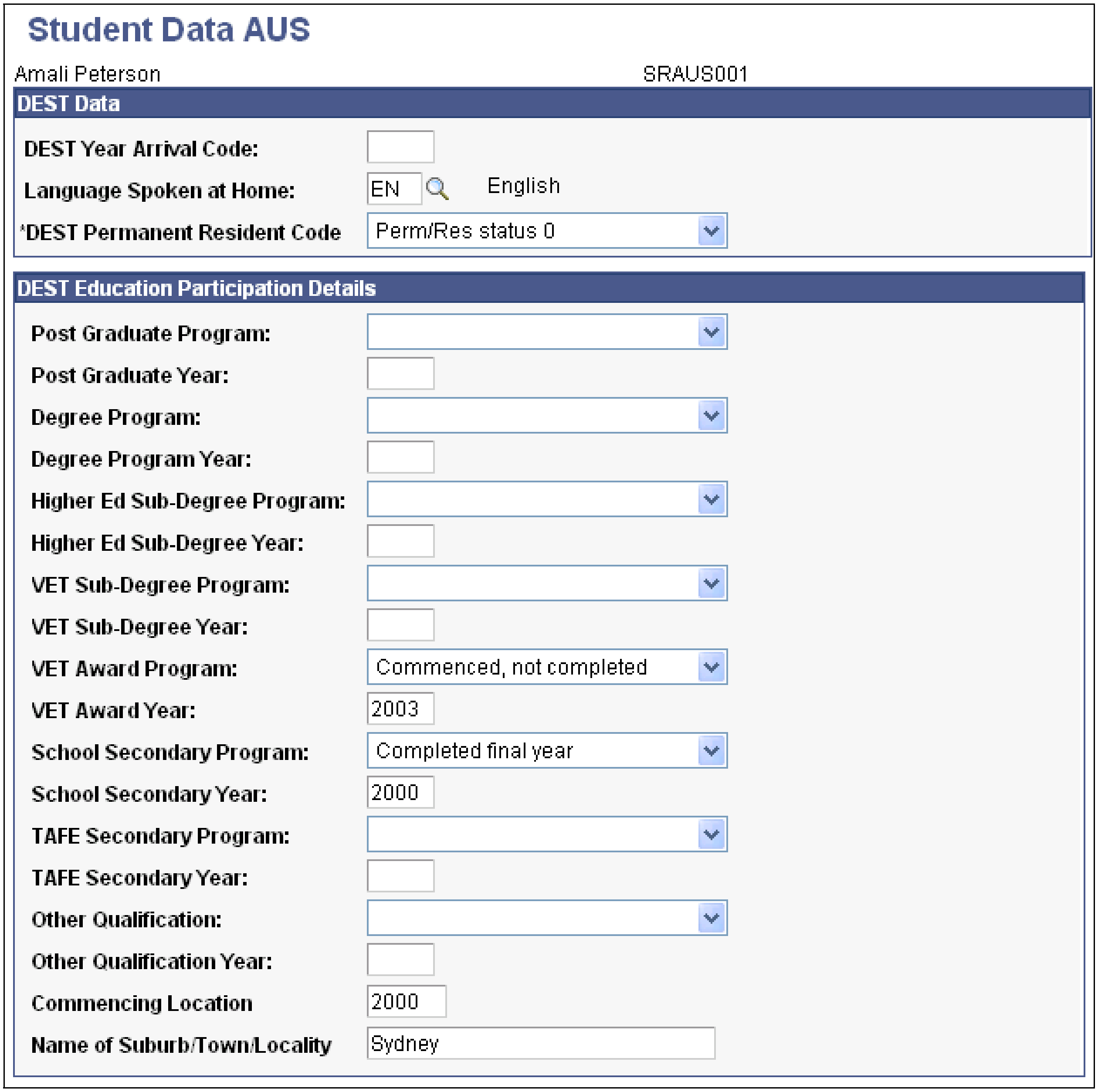
Death Certificate Number

Enter the number from the official certificate of death.

The death certificate number might be required for financial aid reconciliation if the individual is a student, for beneficiary pay out if the individual is an employee, or to receive funds if the individual donated a trust to your institution. Consult your institution's administration.

(AUS) Entering Student Data

Access the Student Data AUS page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, Student Data AUS, Student Data AUS).



Student Data AUS

Amali Peterson SRAUS001

DEST Data

DEST Year Arrival Code:	
Language Spoken at Home:	EN English
*DEST Permanent Resident Code	Perm/Res status 0

DEST Education Participation Details

Post Graduate Program:	
Post Graduate Year:	
Degree Program:	
Degree Program Year:	
Higher Ed Sub-Degree Program:	
Higher Ed Sub-Degree Year:	
VET Sub-Degree Program:	
VET Sub-Degree Year:	
VET Award Program:	Commenced, not completed
VET Award Year:	2003
School Secondary Program:	Completed final year
School Secondary Year:	2000
TAFE Secondary Program:	
TAFE Secondary Year:	
Other Qualification:	
Other Qualification Year:	
Commencing Location	2000
Name of Suburb/Town/Locality	Sydney

Student Data AUS page

DEST (Department of Education, Science and Training) reports require data on students and staff at an institution. The Staff File for DEST is produced using PeopleSoft Human Resources Management System. It is important that the data elements used in the DEST reports be set up and entered properly.

DEST Data

DEEWR Year Arrival Code — Enter the year that a student, who was not born in Australia, entered Australia. This value is reported in element 347.

Language Spoken at Home — Enter the appropriate code to indicate the use of a language other than English at the student's permanent home residence.

The drop-down list includes any PeopleSoft-defined language codes. The DEEWR Enrollment Extract process maps your selection to the numeric DEEWR language code. This value is reported in element 346.

DEEWR Permanent Resident Code — Select the value for reporting in element 390 – Permanent Resident Eligibility for HELP Assistance.

Note. This element is reported as blank in files for the 2009 reporting year and later. It is required for pre-2009 reporting periods, including revisions to those reporting periods.

Refer to DEST's Higher Education Collection Documentation for explanation of the permanent resident codes.

DEST Education Participation Details

Record the status and the last year applicable to each level of education the student has participated in. This data is used to determine the value for elements 493 and 572 if the student is deemed to be a domestic commencing student.

Values for Post Graduate Program,Degree Program, Higher Ed Sub-Degree Program,VET Sub-Degree Program, and VET Award Program are:

Commenced, not completed

Completed all requirements

Never commenced

No information

Not a commencing student

Values for School Secondary Program are:

Completed final year

Did not do final year

No information

Not a commencing student

Values for TAFE Secondary Program are:

Completed such a course

Didn't begin/complete

No information

Not a commencing student

Values for Other Qualification are:

No information

No other qualifications/certs (certifications)

Not a commencing student

Other qualifications/certs (certifications)

Commencing Location	Enter the Australian postcode of a student's permanent home residence in their last year of secondary school. This value is reported in element 476 if the student is deemed to be a domestic school leaver commencing an undergraduate course.
Name of Suburb/Town/Locality	Enter the name of the suburb, town, or locality applicable to the permanent residence of the student in their last year of secondary schooling. This value is reported in element 486 if the student is deemed to be a domestic school leaver commencing an undergraduate course.
Gender Parent/Guardian 1	Select the gender for the first parent or guardian.
Highest Education Parent/Guardian 1	Specify the highest level of education attained by the parent or guardian. The values presented in this prompt are restricted to those applicable to the gender specified for parent/guardian 1.
Gender Parent/Guardian 2	Select the gender for the second parent or guardian.
Highest Education Parent/Guardian 2	Specify the highest level of education attained by the parent or guardian. The values presented in this prompt are restricted to those applicable to the gender specified for parent/guardian 2.

Managing Relationships Data

This section lists prerequisites and discusses how to:

- Relate one individual to another.
- Identify an individual's legacy relationship to the institution.
- Specify communications for the communication recipient relationship.

- Create joint communications relationships.
- Enter relationship addresses.
- Enter relationship detail data.
- View a list of relationships.
- Identify an individual's relationship with the institution.

Prerequisites

Before you can enter relationship data, you must define the relationship types for which you want to collect information. To use full relationship functionality, you must also define legacy affiliations, create institutions and academic programs, and create letter codes to identify communications to send to related individuals and set up salutation types to use.

Pages Used to Enter Relationships Data

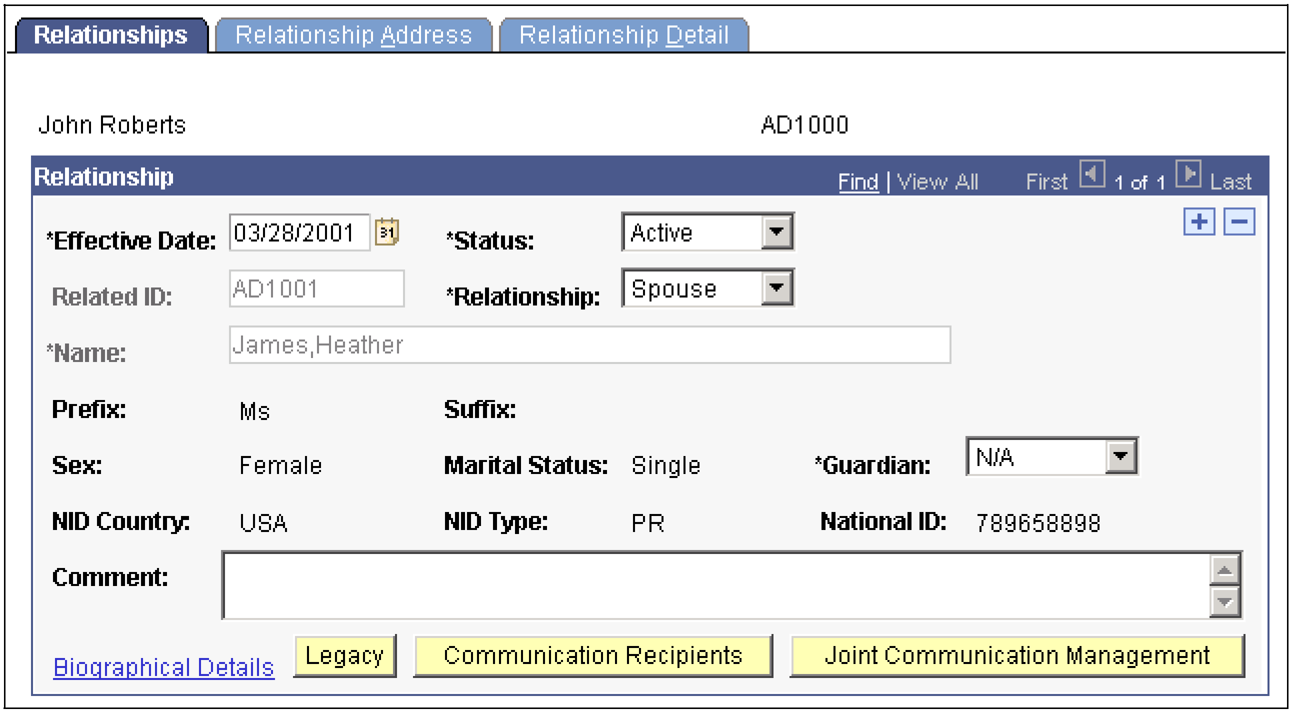
Page Name	***Definition Name***	***Navigation***	***Usage***
Relationships	RELATIONSHIPS	• Campus Community, Personal Information, Biographical, Relationships, Relationships • Contributor Relations, Prospect Management, Relationships, Relationships • Contributor Relations, Constituent Information, People, Relationships, Relationships • Student Admissions, Application Entry, Relationships, Relationships • Student Recruiting, Maintain Prospects, Relationships, Relationships	Enter data to associate one individual with another individual inside or outside of your database.
Legacy Information	LEGACY_SEC	Click the Legacy button on the Relationships page.	Identify a related person's legacy relation with your institution.

Page Name	***Definition Name***	***Navigation***	***Usage***
Communication Recipient	REL_MLT_RECPNT_SEC	Click the Communication Recipients button on the Relationships page.	Specify the communications for which a copy should also be sent to the related person.
Joint Communication Management	RELATION_SALU_SEC	Click the Joint Communication Management button on the Relationships page.	Create joint communications between two related individuals and establish how their names should appear in the address and salutation. You can also use this page to dissolve joint communications for these individuals.
Relationship Address	REL_ADDR_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Address • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationship, Relationships • Student Recruiting, Maintain Prospects, Relationships	Review addresses for the primary individual and for the related individual. If the related person does not have an ID in your system, the Edit Address link is available for you to enter an address for this person. If you use the communication recipient feature, this is also where you select the related individual's address to send a copy letter. Also, if you use the joint communication feature, this is where you select which address (either from the primary or from the related ID's addresses) to which you want to send the joint communications.

Page Name	***Definition Name***	***Navigation***	***Usage***
Relationship Detail	RELATIONSHIP_DTL	• Campus Community, Personal Information, Biographical, Relationships, Relationship Detail • Contributor Relations, Prospect Management, Relationships • Contributor Relations, Constituent Information, People, Relationships • Student Admissions, Application Entry, Relationships • Student Recruiting, Maintain Prospects, Relationships	Enter information about the related person that is of interest to your institution.
Person-to-Person Summary	RELATIONSHIP_SUMRY	Campus Community, Personal Information, Biographical, Relationships, Person to Person - Summary	View a list of relationships for an individual.
Relations with Institution	PERS_INST_REL	• Campus Community, Personal Information, Biographical, Relationships, Relations with Institution • Student Admissions, Application Entry, Relationships, Relations with Institution • Student Recruiting, Maintain Prospects, Relationships, Relations with Institutions	Specify or review an individual's relations to your institution.

Relating One Individual to Another

Access the Relationships page (Campus Community, Personal Information, Biographical, Relationships, Relationships).



Relationships page

You can create the same relationship between the same two people on this page. The system validates the Effective Date and Status of the relationships. As long as the new relationship is not concurrent with the existing, the system does not return an error, allowing you to track remarriages, for example.

Relationship

Related ID

If the related person is in your database, select the related person's ID. When you select the ID, the system displays the related person's biographical data, including the person's name, prefix, suffix, sex, marital status, and primary NID information.

If the related person is not in your database, the name and biographical data fields are available so that you can enter the related person's name and data.

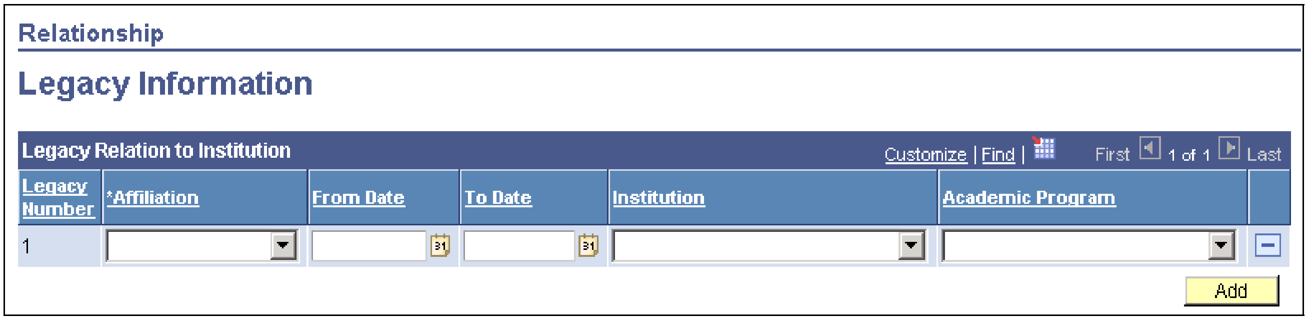
Note. The Related ID field is available when you are creating the relationship between these individuals for the first time. After you create and save the relationship, when you return to the Relationships page, the system continues to display the related ID and biographical data, but you cannot edit or update it from here. If you need to edit or update the related person's biographical data, click the Biographical Details link at the bottom of the page. You then determine if you need to update information on the Biographical Details page or reconsider the relationship that you are creating.

Relationship	Specify the related person's relationship, such as mother, neighbor, employer, or loan reference to this individual. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort. **Note.** If you set up marital status verification on the Relationship / Marital Status page, the system verifies the marital status on the Biographical Details page for each individual against the relationship that you select here. If the marital status of either individual is not the appropriate status for the specified relationship, the system displays a warning message suggesting that you update the marital status for the individuals on the Biographical Details page.
Guardian	Select the legal guardianship that describes the status of the related person to the primary individual. Values are: *Guardian* *N/A* *Other* *Parent* *Self* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Comment	Enter comments to further identify or describe the related person or the relationship between the two individuals.
Biographical Details	Click to access the Biographical Details page, on which you can view or update the related person's biographical data.
Legacy	Click to access the Legacy Information page, on which you can identify the related person's legacy relation with your institution.
Communication Recipients	Click to access the Communication Recipient page, on which you can specify the communications for which a copy should also be sent to the related person.
Joint Communication Management	Click to access the Joint Communication Management page, on which you can create or dissolve joint communications for these two individuals.

Warning! Individuals can have several relationships in your database; however they can have joint communications with only one of those relationships. For example, you can create a relationship between Gloria Wilson and her husband, Mark Gonzalez, and you can create a relationship between Gloria Wilson and her mother, Maria Wilson. You can then create joint communications with either Gloria and her husband or Gloria and her mother, but you cannot create joint communications for both.

Identifying an Individual's Legacy Relation to the Institution

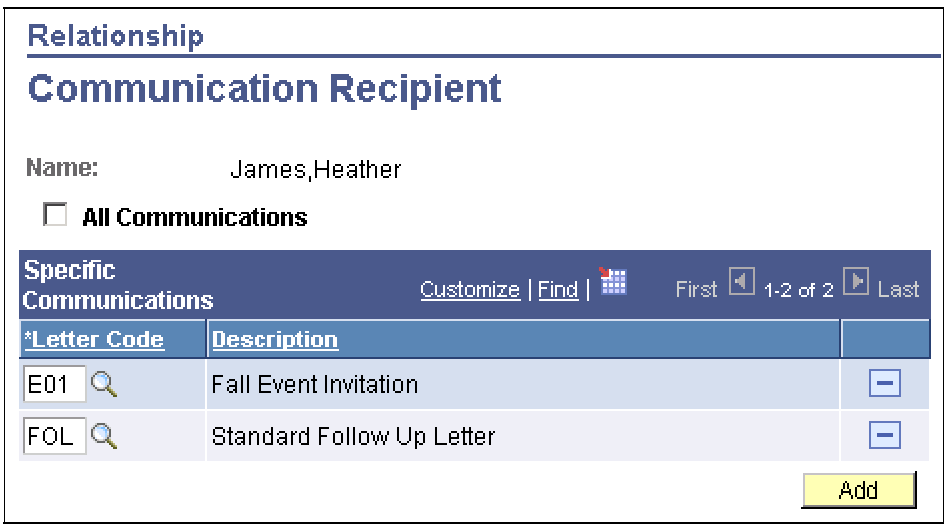
Access the Legacy Information page (click the Legacy button on the Relationships page).



Legacy Information page

Specifying Communications for the Communication Recipient Relationship

Access the Communication Recipient page (click the Communication Recipients button on the Relationships page).



Communication Recipient page

You can create letter copies to send to an individual's related IDs. You can create copies of all communications generated for the primary ID or select specific communications to copy. To create the copy letter, you must set up a template with the related ID's name and address. When the letter generation data extract process encounters a letter code that is set to include a copy to the individual's related ID, it extracts the related person's address data from the Relationship Address page.

Note. For confidentiality purposes, the communication recipients that you set here will not receive copies of communications set to allow joint communications for a relationship, even when you select *All Communications.* This preserves information communicated to Mr. and Mrs. Smith, for example.

All Communications	Select to generate a copy for this related individual of all communications to the primary individual.
Letter Code	Enter the letter codes for the communication to copy. Available letter codes are from the Standard Letter Codes page.

Warning! When an individual has multiple relationships set up with communication recipients, the process extracts data for all of the related IDs. When merging the data into the template, the process lists a maximum of five recipients as receiving a copy. You can create and send copies to more than five recipients, but the letter can list only five, as shown in the following sample letter.

The following graphic provides an example of the CCLTRREC.doc letter that is created for recipients set on the Communication Recipient page:

PeopleSoft8

July 25, 2001

Ralph E Crowe
506 Harbour Place
Sydney
Australia

This communication has been sent to John Roberts. You are receiving a copy because you either requested to receive a copy or the school has designated you to receive a copy of this type of letter.

Dear John Roberts:

Thanks for your interest in PeopleSoft University! Before we can review your application, we need to receive the following items from you as soon as possible.

If you have any questions about the above items, please feel free to contact the Admissions Office at 888-555-1212. We look forward to reading your completed application!

Sincerely,

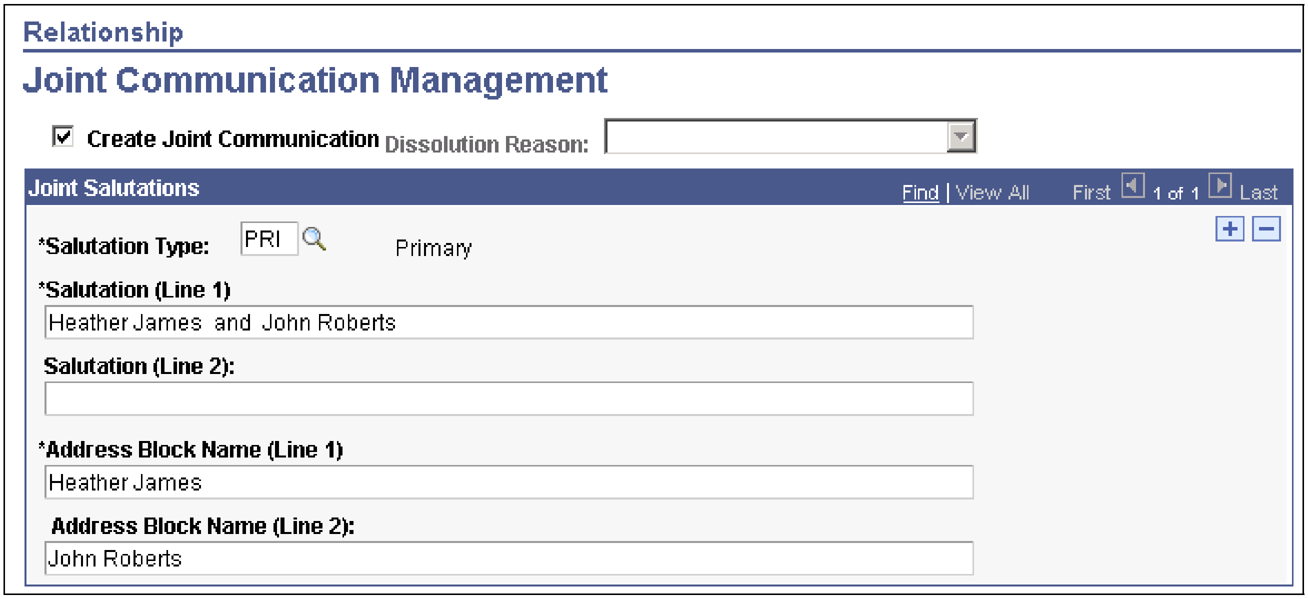
Barbara Smith
Admissions Office

cc Joanne Beatrice Allen
cc Julianne Binoche
cc Ralph E Crowe
cc Ted Han

Example of the CCLTRREC.doc letter that is created for recipients set on the Communication Recipient page

Creating Joint Communications Relationships

Access the Joint Communication Management page (click the Joint Communication Management button on the Relationships page).



Joint Communication Management page

Create Joint Communication

Select to address joint communications to both the primary and related individuals, using the salutation that you specify on this page.

Dissolution Reason

When you clear the Create Joint Communication check box, or when you inactivate the relationship to stop joint communications for these two individuals, the Dissolution Reason field becomes available, enabling you to enter the reason for dissolving the joint communications. Values include:

Deceased Partner

Divorce

Per Request

Values for this field are delivered with your system as translate values. You can modify these translate values.

Joint Salutations

Salutation Type

Specify the type of salutation, from the Joint Salutation Type Table page, to use for joint communications to these IDs.

When you enter a salutation type, the system displays the individual's names in the Salutation and Address Block Name fields, based on the default formats associated with that salutation type. The default formats are designed to reduce data entry; however always validate that the information is correct.

Note. When you select the Create Joint Communication check box, the system displays the default salutation type from the Installation Default – CC page, if you entered one. You can add salutation types, but do not delete the one that you defined as the default value. Use the default value as the lowest level joint usage on the Name Usage page so that when you run the letter generation process, it does not fail due to a lack of salutation type.

Salutation (Line 1), Salutation (Line 2)

The system displays the names of the two individuals as they will appear in the greeting of the letter according to the default salutation format for the salutation type defined on the Joint Salutation Type Table page.

Example values include:

Mr. and Mrs. Smith

or, using two lines:

John Smith

Mary Fletcher

Address Block Name (Line 1) Address Block Name (Line 2)

The system displays the names of the two individuals as they will appear in the address of the letter (and envelope or label if applicable) according to the default address block format for the salutation type defined on the Joint Salutation Type Table page.

Example values include:

Mr. and Mrs. Smith

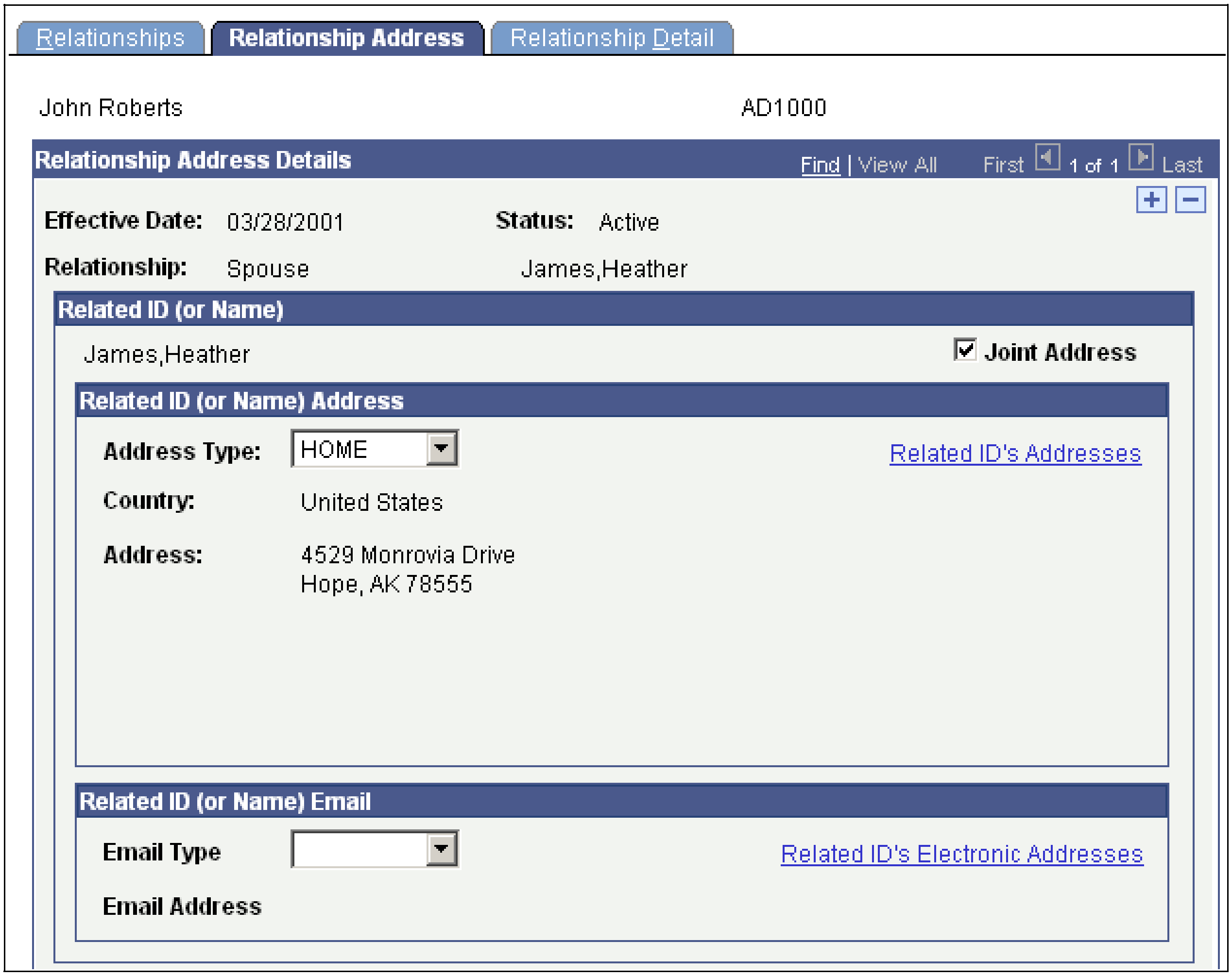
or, using two lines:

John Smith

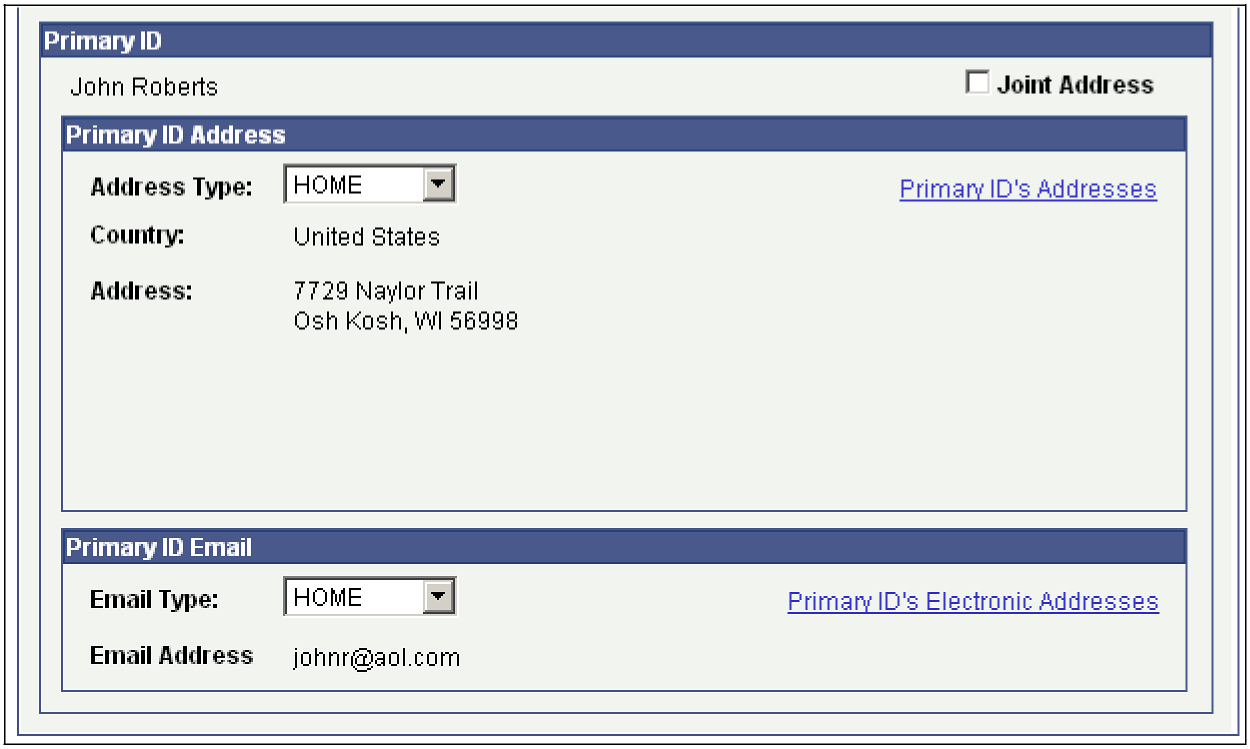
Mary Fletcher

Entering Relationship Addresses

Access the Relationship Address page (Campus Community, Personal Information, Biographical, Relationships, Relationship Address).



Relationship Address page (1 of 2)



Relationship Address page (2 of 2)

Related ID (or Name)

Joint Address

Select to send joint communications for these two individuals to this address.

If the related person does not have an ID in your database, this check box is unavailable. For the system to generate a joint communication, the address must be associated with an ID in your system.

For joint communications, you must select either the related individual's address or the primary individual's address as the joint address to use. You cannot select both.

Related ID (or Name) Address

Address Type	Select the address type to use for the related individual in association with this relationship. If the related person does not have an ID in your database, the Edit Address link becomes available. Click the link to enter the related person's address data. If the individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available. If you do not select an address type, the default value is the address type selected in the Address For Related ID field on the Installation Default - CC page.
Related ID's Addresses	If the related person has an ID in your database, you can click this link to access the Addresses page where you can view or update the related person's address data. If the related person does not have an ID in your database, this link is not available.

Related ID (or Name) Email

Email Type	Select the related individual's email address type to associate with this relationship.
Email Address	Enter the related individual's email address. If the related person has an ID in your database, the email address for the specified email type appears. If the related person does not have an ID in your database, the field is not available.
Related ID's Electronic Addresses	If the related person has an ID in your database, click this link to access the Electronic Addresses page where you can view or update the related person's email address data. If the related person does not have an ID in your database, this link is not available.

Primary ID

Joint Address	Select to send joint communications for this relationship to this address. For joint communications, you must select either the related individual's address or the primary individual's address as the joint address to use. You cannot select both.

Primary ID Address

Address Type	Select the primary individual's address type to associate with this relationship. Because the primary individual has an ID in your database, the system automatically displays the address data for the address type that you select. Only address types that contain data are available. If you do not select an address type, the default value is the address type selected in the Address For Primary ID field on the Installation Default - CC page.
Joint Address	Select to send joint communications for these two individuals to this address. If you are creating joint communications for this relationship, you can select either the related individual's address or the primary individual's address as the joint address, but you *must* select one of them. You cannot select both.
Primary ID's Addresses	Click this link to access the Addresses page, on which you can edit or update the primary person's address data.

Primary ID Email

Email Type	Select the primary individual's email address type to associate with this relationship.
Email Address	Displays the email address for the email type selected.
Primary ID's Electronic Addresses	Click this link to access the Electronic Addresses page, on which you can view or update the primary person's email address data.

Note. The email addresses that you enter on the Relationship Addresses page are used by the Communication Generation process to send emails to the communication recipients. When no email address is entered, intended recipients will not receive a copy of the communication.

Entering Relationship Detail Data

Access the Relationship Detail page (Campus Community, Personal Information, Biographical, Relationships, Relationship Detail).

Relationship Detail page

Relation Demographics

For related individuals with or without an ID in your database, enter data in the fields in this area. For a related individual with an ID in your database, you can click the Biographical Details link at the bottom of the page, to review additional information.

Income Enter the amount of the related individual's income and the currency in which it is expressed. The amount is usually expressed annually, but it can be expressed hourly or monthly.

Occupation Enter the related individual's occupation, from the Standard Occupation Classification Code page.

External Org ID If the related person is associated with or employed by an organization that is in your database, identify that organization here.

Employer The system automatically displays the name of the related person's employer if you selected an employer ID. If the employer does not have an organization ID in your database, you can manually enter the employer's name here.

Highest Education Level Specify the highest level of education that the related person has achieved.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Relation Residency

Country, State, and **Date**	For related individuals with or without an ID in your database, you must enter the related individual's country, state and date of residency information.

Daytime Telephone

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's daytime, evening, and fax telephone numbers.

Email ID

When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's email ID and URL.

Country of Citizenship

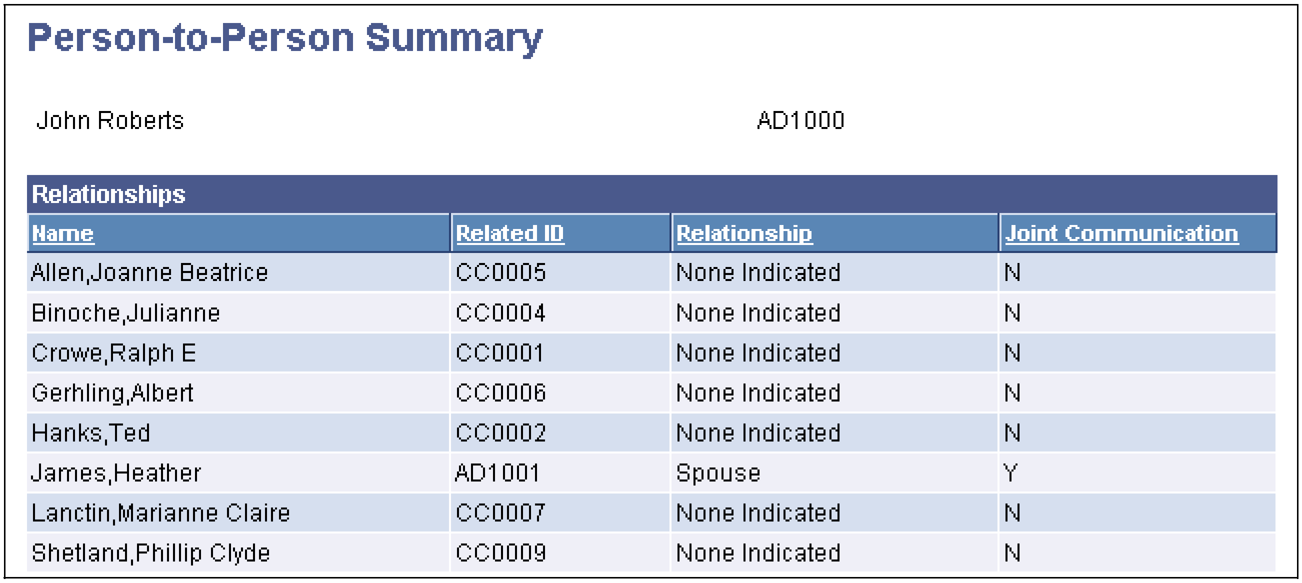
When the related person does not have an ID in your database, the system displays this group box with fields available for you to enter the related person's country of citizenship and citizenship status based on the Citizen Status Table page.

Links

Phones	Click this link to access the Phone Numbers page, on which you can review or change telephone numbers for the related ID. For a related individual with no ID in your database, manually enter the individual's phone data in the Daytime Telephone section.
Email Address	Click this link to access the Electronic Addresses page, on which you can review or change URLs and email addresses for the related ID. For a related individual with no ID in your database, manually enter the individual's email data in the Email ID section.
Biographical Details	If this related individual has an ID in your database, click this link to access the Biographical Details page, on which you can review or change additional basic data for the related ID.
Citizenship and Passport Date	Click this link to access the Citizenship/Passport page, on which you can review or change additional citizenship and passport data for the related ID. For related individuals without an ID in your database, you must manually enter the related individual's Citizen Country and Citizenship Status.

Viewing a List of Relationships

Access the Person-to-Person Summary page (Campus Community, Personal Information, Biographical, Relationships, Person to Person - Summary) to view a list of an individual's relationships.



Person-to-Person Summary

John Roberts AD1000

Relationships

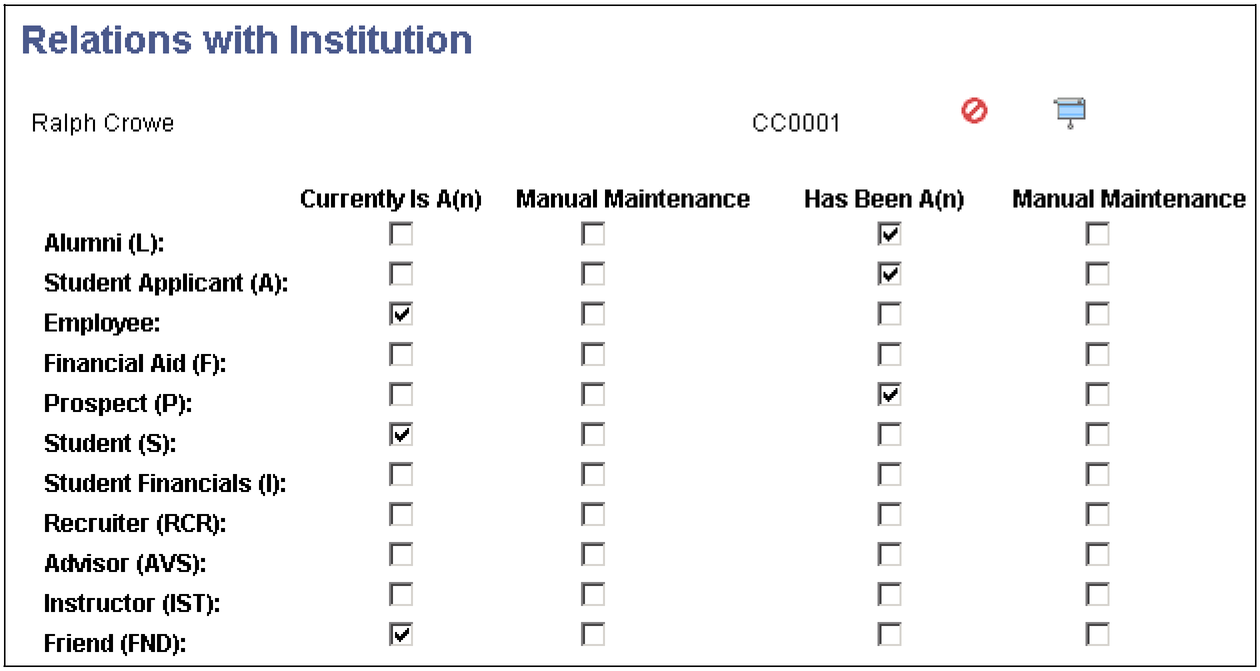
Name	Related ID	Relationship	Joint Communication
Allen,Joanne Beatrice	CC0005	None Indicated	N
Binoche,Julianne	CC0004	None Indicated	N
Crowe,Ralph E	CC0001	None Indicated	N
Gerhling,Albert	CC0006	None Indicated	N
Hanks,Ted	CC0002	None Indicated	N
James,Heather	AD1001	Spouse	Y
Lanctin,Marianne Claire	CC0007	None Indicated	N
Shetland,Phillip Clyde	CC0009	None Indicated	N

Person-to-Person Summary page

The Person-to-Person Summary page is for viewing only. You cannot enter or edit data here. Data that appears here is entered on pages in the Relationships component.

Identifying an Individual's Relationship with the Institution

Access the Relations with Institution page (Campus Community, Personal Information, Biographical, Relationships, Relations with Institution).



Relations with Institution

Ralph Crowe CC0001

	Currently Is A(n)	Manual Maintenance	Has Been A(n)	Manual Maintenance
Alumni (L):	☐	☐	☑	☐
Student Applicant (A):	☐	☐	☑	☐
Employee:	☑	☐	☐	☐
Financial Aid (F):	☐	☐	☐	☐
Prospect (P):	☐	☐	☑	☐
Student (S):	☑	☐	☐	☐
Student Financials (I):	☐	☐	☐	☐
Recruiter (RCR):	☐	☐	☐	☐
Advisor (AVS):	☐	☐	☐	☐
Instructor (IST):	☐	☐	☐	☐
Friend (FND):	☑	☐	☐	☐

Relations with Institution page

Note. PeopleSoft Contributor Relations Solutions uses the abbreviations on this page in the contributor relations search.

Currently Is A(n)
Select to indicate that the individual is currently related in this way to your institution.

Has Been A(n)
Select to indicate that the individual has previously been related in this way to your institution.

Manual Maintenance
Select to indicate that this relationship (current or past as appropriate) should be maintained manually and not used or changed by mass change or any other automatic process.

Entering Emergency Contact Data

This section discusses how to

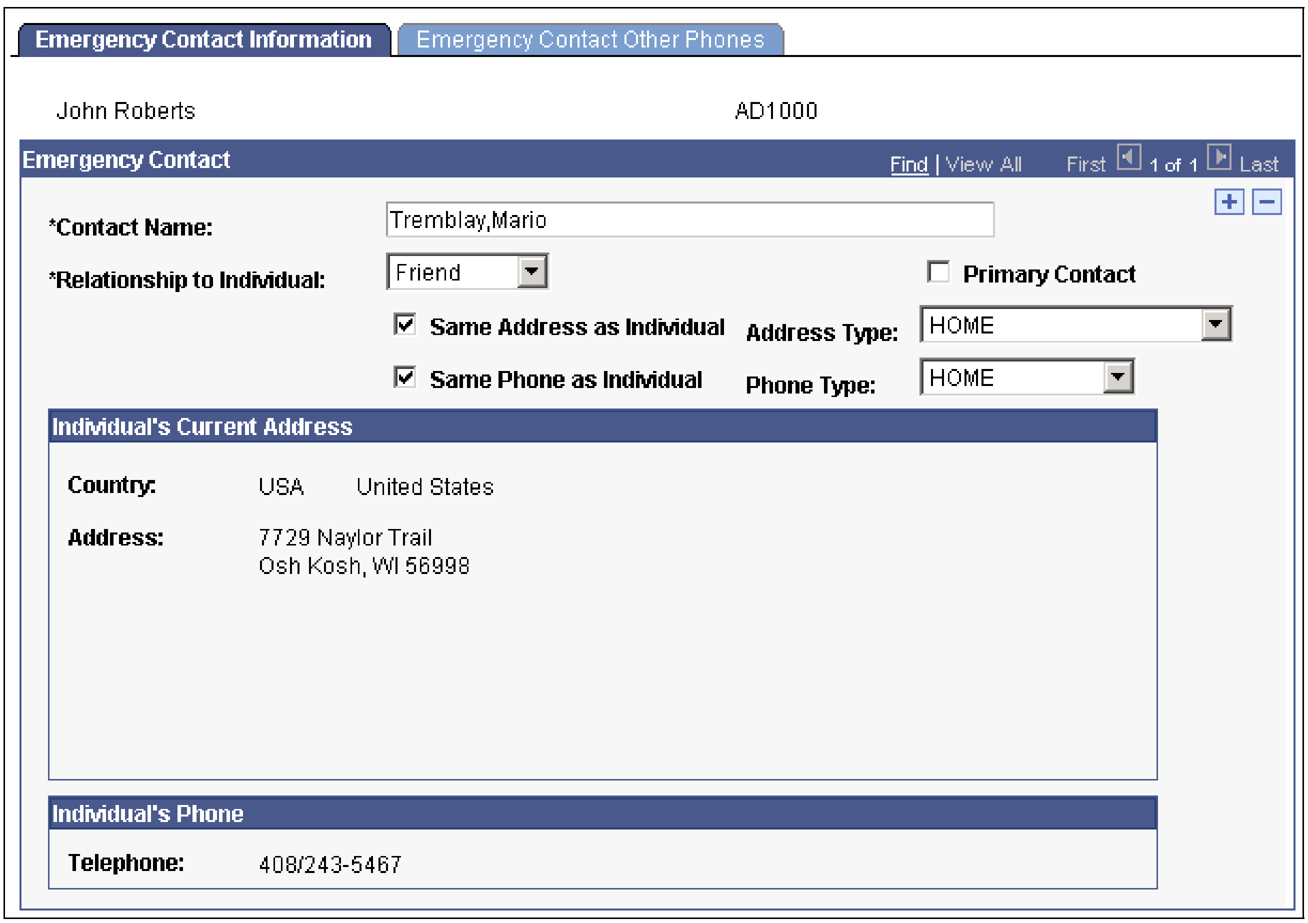
- Enter emergency contact data.
- Enter additional phone numbers for the emergency contact.

Pages Used to Enter Emergency Contact Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Emergency Contact Information	SCC_EMERG_CNTCT1	Campus Community, Personal Information, Biographical, Emergency Contacts	Enter an individual's emergency contact data, including the contact's name, addresses, and primary phone number.
Emergency Contact Other Phones	SCC_EMERG_CNTCT2	Campus Community, Personal Information, Biographical, Emergency Contacts, Emergency Contact Other Phones	Enter additional telephone numbers for an emergency contact.

Entering Emergency Contact Data

Access the Emergency Contact Information page (Campus Community, Personal Information, Biographical, Emergency Contacts).



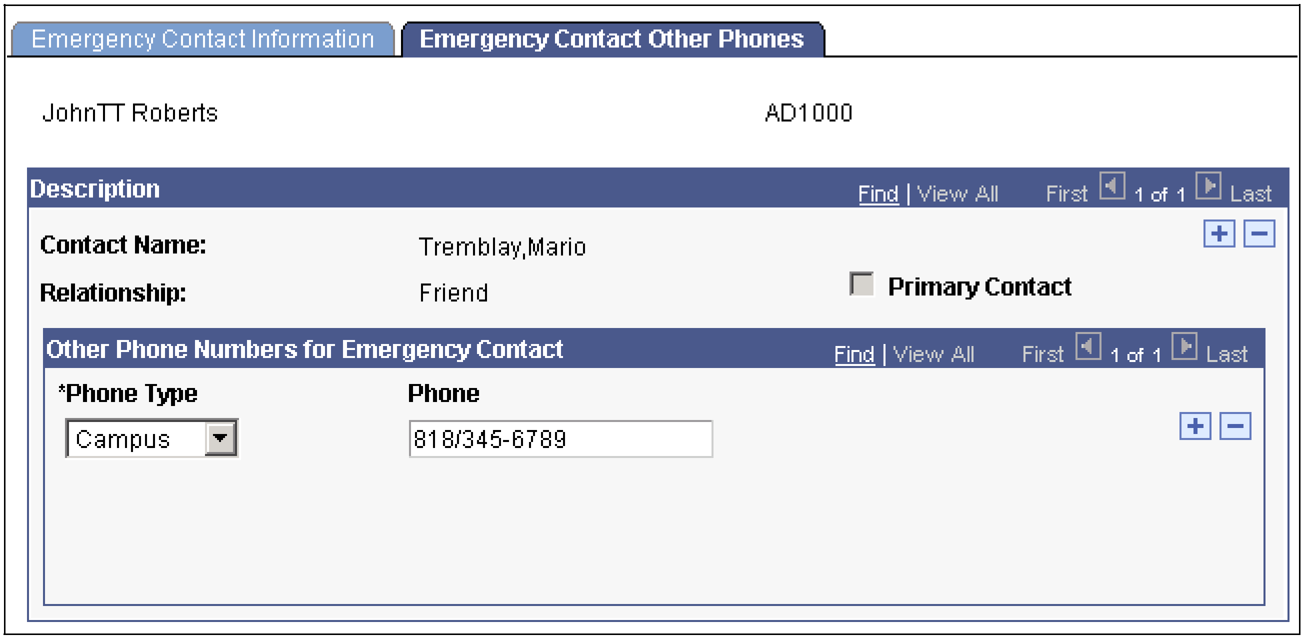
Emergency Contact Information page

Emergency Contact

Contact Name	Enter the name of the emergency contact for this individual.
Relationship to Individual	Select the option that indicates the contact's relationship to the individual at your institution. Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Primary Contact	Select to indicate that this is the first person to contact in an emergency. You can enter only one primary contact for an individual.
Same Address as Individual and **Address Type**	Select to indicate that the contact has the same address information as the individual in your database, and then select that individual's address type that is the same as this contact's address type. If it is selected, you do not need to complete any of the address fields. The system displays the correct address data. **Note.** If Same Address as Individual is not selected, the address area of the page is titled *Contact Address.* When Same Address as Individualis selected, the title becomes *Individual's Current Address.*
Same Phone as Individual and **Phone Type**	Select to indicate that the contact has the same phone information as the individual in your database, and then select that individual's phone type that is the same as this contact's phone type. If it is selected, you do not need to complete any of the phone fields. The system displays the correct phone data. An emergency contact can have the same address as the primary individual, but have a different phone number. **Note.** If Same Phone as Individual is not selected, the phone area of the page is titled *Contact Phone.* When Same Phone as Individualis selected, the title becomes *Individual's Phone.*

Entering Additional Phone Numbers for the Emergency Contact

Access the Emergency Contact Other Phones page (Campus Community, Personal Information, Biographical, Emergency Contacts, Emergency Contact Other Phones).



Emergency Contact Other Phones page

Other Phone Numbers for Emergency Contact

Phone Type Select the phone type that describes the additional phone number for this emergency contact.

Phone Enter the additional phone number for this emergency contact.

Tracking Work Experience

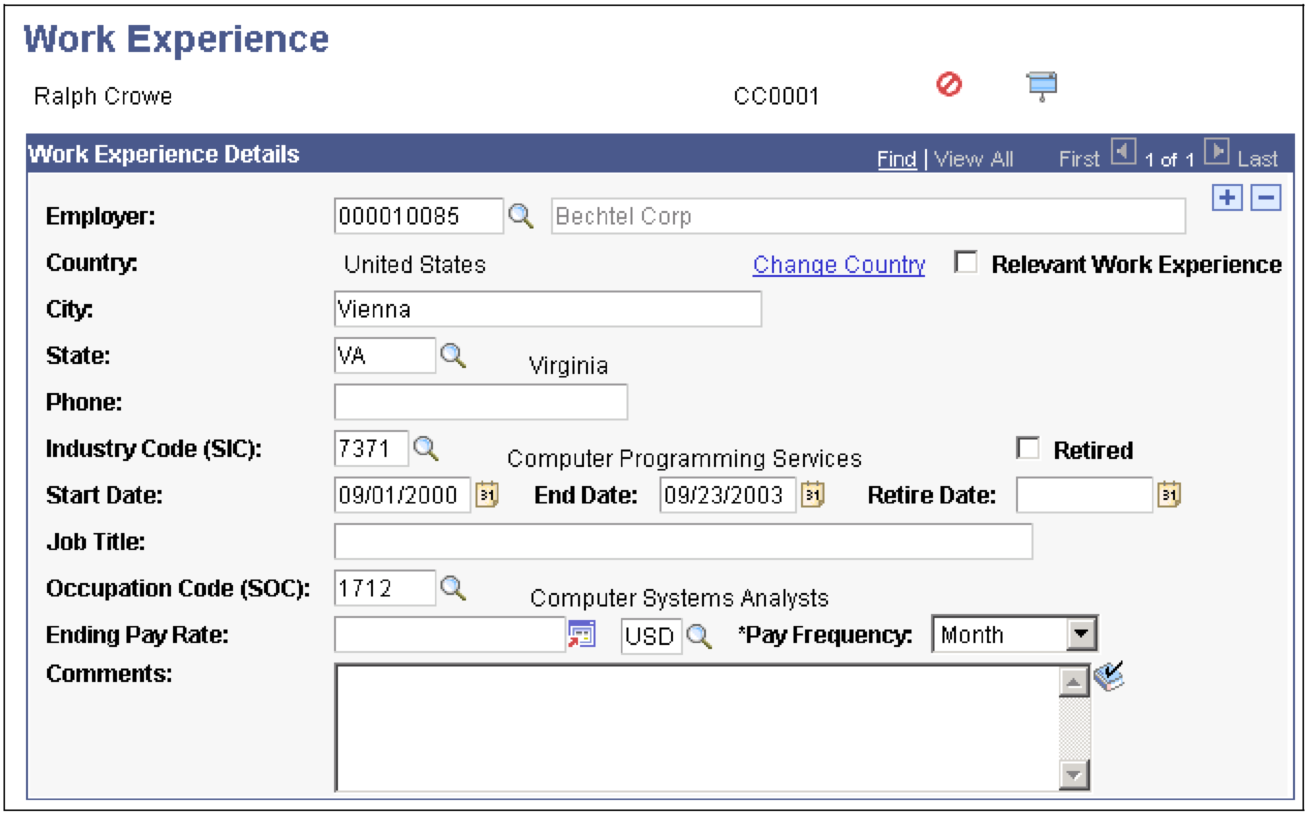
This section discusses how to enter work experience data.

Pages Used to Track Work Experience

Page Name	*Definition Name*	*Navigation*	*Usage*
Work Experience	PRIOR_WORK_EXP_SA	• Campus Community, Personal Information, Biographical, Work Experience • Student Admissions, Application Entry, Relationships, Work Experience • Student Recruiting, Maintain Prospects, Relationships, Work Experience • Contributor Relations, Constituent Information, People, Relationships, Work Experience • Student Recruiting, Student Recruiters, Participation and Achievements, Work Experience	Enter data to track an individual's work experience.

Entering Work Experience Data

Access the Work Experience page (Student Recruiting, Student Recruiters, Participation and Achievements, Work Experience).



Work Experience Page

Work Experience Details

Employer	If the employer is an organization in your database, enter the organization's ID. The system displays the organization name and address. If the employer is not an organization in your database, enter the employer's name and address.
Relevant Work Experience	Select to indicate that the former position is relevant to a current position within your institution or to the career that the individual is seeking.
Retired and **Retire Date**	If the person retired from this employer, select this check box and enter the date on which the individual retired.
Industry Code (SIC) (industry code [Standard Industrial Classification])	Enter the SIC for this position.
Start Date and **End Date**	Enter the dates on which the individual began and ended employment with this employer.
Job Title	Enter the title of the last position that the individual held with this employer.

Occupation Code (SOC) (occupation code [Standard Occupation Classification])	Select the SOC codes for this position.
Ending Pay Rate	Enter the pay rate and currency at which the individual ended employment.
Pay Frequency	Select the frequency that describes the ending pay rate. The default value is *Month.*
Comments	Enter comments to further describe this work experience.

Chapter 37

(AUS) Managing CHESSN Data Storage

This section provides an overview of Commonwealth Higher Education Student Support Number (CHESSN) data as it is used within PeopleSoft Campus Solutions and discusses how to store CHESSN data.

Understanding CHESSN Data

CHESSN is a number assigned by HEIMS that uniquely identifies each student who receives Commonwealth assistance. All Commonwealth supported students or students who receive any Higher Education Loan Programme (HELP) assistance (HECS-HELP, FEE-HELP, OS-HELP) *must* have a CHESSN. The government uses the unique identifier to manage and monitor the Commonwealth assistance entitlements of students as defined by Higher Education Support Act 2003. The CHESSN allocated to a student is a life long identifier, therefore, except for exceptional circumstances, once a student is allocated a CHESSN, it will remain with them for life. Equally, an individual (student) must have only one active CHESSN.

Higher Education Providers (HEPs) can provide to HEIMS the data required for CHESSN allocation in one of the following ways:

- In XML format sent to HEIMS through a web service channel (for allocation of one or many students).
- Typed directly into a HEIMS web browser screen available to HEPs.

  This method is typically reserved for the request for allocation of a small number of CHESSNs.

The data sent through either of the above two methods provides information about students, such that HEIMS can provide a *provisional* CHESSN. The information provided by the HEP to HEIMS will also be used to identify, with high probability, a unique individual so as to prevent and minimize the probability of allocating multiple CHESSNs per student.

A CHESSN becomes *active* within HEIMS only when a record for the student is received in the Load-Liability file (LL file). The HEP informs students of their CHESSN through the Commonwealth Assistance Notice (CAN) service. The CAN service is a part of the HELP loans processing feature and is documented in the PeopleSoft Campus Solutions Student Financials PeopleBook.

Storing CHESSN Data

PeopleSoft provides the CHESSN Data component (SCC_CHESSN_AUS) through which you can record and store important CHESSN information for individual students. The component can be used preliminarily to store data for each student that you send to HEIMS for the CHESSN allocation process. Once HEIMS allocates provisional CHESSNs, you can record each student's CHESSN number with a *Provisional* status. Later, when students enroll, you send HEIMS the student's records in a Load-Liability (LL) file. Upon receiving the LL file, HEIMS updates the CHESSN status to *Active* for all reported students. You can then update the status in your system.

This section discusses how to:

- Enter CHESSN data.
- Enter CHESSN Year 12 data.
- Enter CHESSN previous HEP data.

Note. In addition to manually entering CHESSN data in the CHESSN Data component for students with newly assigned provisional or active CHESSNs, you can receive previously assigned CHESSN numbers for students by way of TAC (Tertiary Admissions Centre) loads. CHESSN values appear on the Personal Data page in the TAC suspense and TAC posting components.

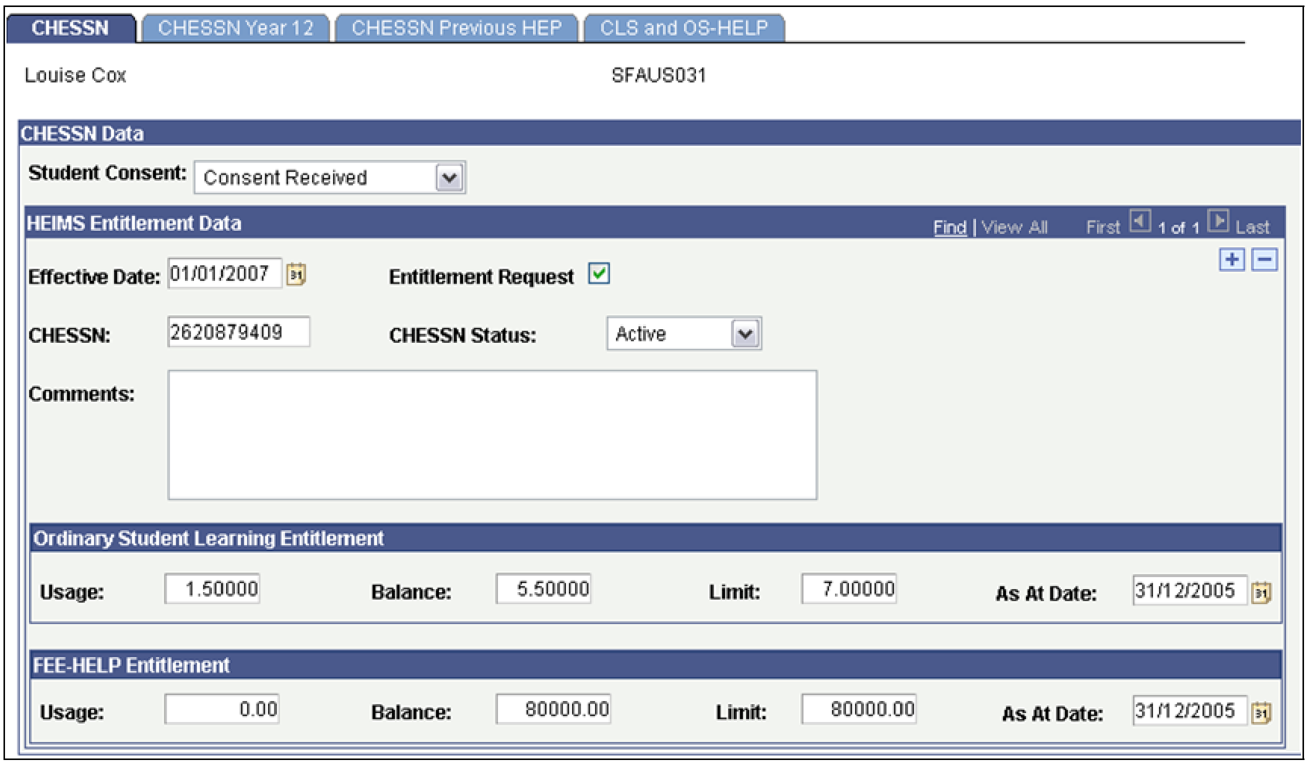
Pages Used to Store CHESSN Data

Page Name	***Definition Name***	***Navigation***	***Usage***
CHESSN	SCC_CHESSN_AUS	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN	Record CHESSNs, SLE usage, and remaining FEE-HELP balance for a student.
CHESSN Year 12	SCC_YR12_AUS	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN Year 12	Record Year 12 information for a student.
CHESSN Previous HEP	SCC_HEP_AUS	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN Previous HEP	Record previous HEP attendance information for a student.

Page Name	Definition Name	Navigation	Usage
CLS and OS-HELP	SCC_CLS_AUS	Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CLS and OS-HELP	Record entitlement information for CLS and OS_HELP.

Entering CHESSN Data

Access the CHESSN page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN).



CHESSN Page

CHESSN Data

Student Consent

Enter a value regarding the student's consent for releasing his or her information to HEIMS for CHESSN allocation. Choices are: *Consent Denied*, *Consent Received*, and *Consent not yet sought.*

HEIMS Entitlement Data

Entitlement Request

Select this check box if the data is the result of an HEIMS entitlement request.

CHESSN

Enter the student's assigned CHESSN. The system verifies the CHESSN number that you enter against the ISO 7064 Algorithm specified by the Department of Education, Employment and Workplace Relations (DEEWR).

CHESSN Status

HEIMS assigns a status of *Active, Provisional,* or *Suspended* to each CHESSN.

The CHESSN status is *Provisional* until a student is reported through the LL file as enrolled with their account settled, at which time HEIMS updates the status to *Active.*

Enter the appropriate value in this field.

Comments

Enter any comments regarding this record.

Ordinary Student Learning Entitlement, Fee-HELP Entitlement, Commonwealth Scholarships, and OS-HELP Entitlement

For each of the applicable entitlement types, enter the following information:

Usage

Enter the amount of this entitlement used by the student.

For example, for SLE, enter the of EFTSL (equivalent full time student load) units used by the student. For Fee-HELP, enter the monetary amount of FEE-HELP used by the student. Express the amount in AUS currency or the default currency set for your institution.

Balance

Enter the amount of this entitlement unused by the student.

Limit

Enter the maximum amount of this entitlement allowed for the student.

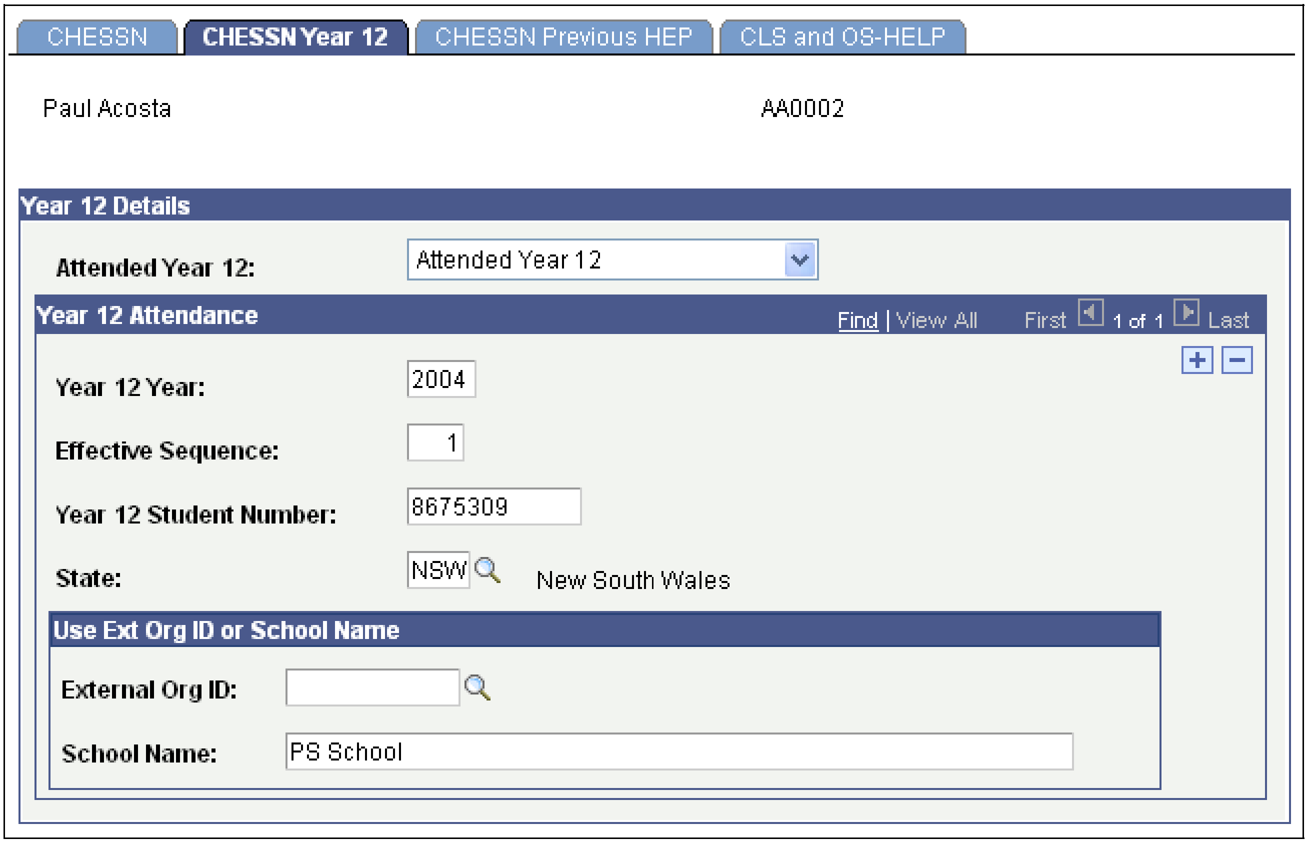
As At Date

Enter the date when this entitlement data was received from HEIMS.

Data is considered confirmed by HEIMS as accurate on the date when your institution receives it.

Entering CHESSN Year 12 Data

Access the CHESSN Year 12 page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN Year 12).



CHESSN Year 12 page

Attended Year 12

Enter a value regarding the student's year 12. Choices are: *Attended Year 12*, *Did Not Attend Year 12*, and *Unknown.* If you select *Attended Year 12*, additional fields appear on the page.

Year 12 Year

Enter the academic year in which the student was enrolled as year 12.

Effective Sequence

If the student attended more than one year 12 organization in the same year, use a unique effective sequence to identify each instance. The system populates this field to 1 by default, and then increments the value each time a new row is added with the same year as an existing row.

Year 12 Student Number

Enter the student's identification number from their year 12 organization.

State

Enter the state in which the student attended year 12.

Use Ext Org ID or School Name

External Org ID

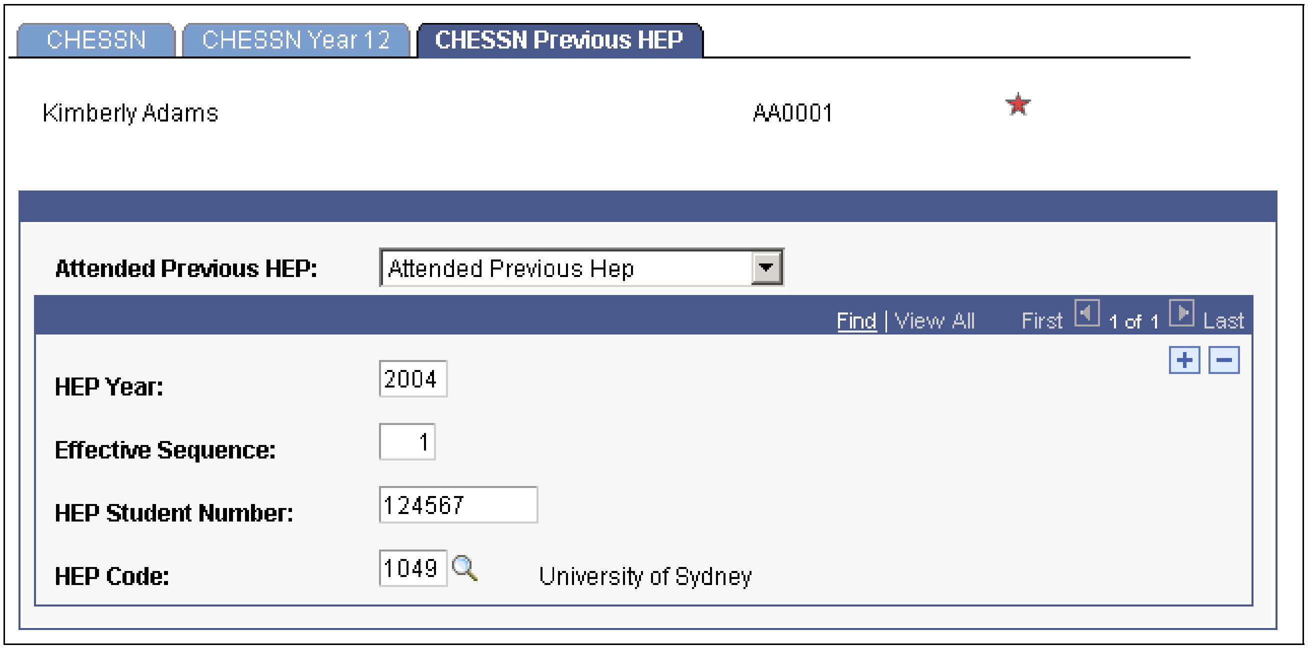
If you have defined schools as organizations, you can select the school using the prompt in this field.

School Name

If you have not defined the school as an organization in your system, enter the school name.

Entering CHESSN Previous HEP Data

Access the CHESSN Previous HEP page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CHESSN Previous HEP).



CHESSN Previous HEP page

Attended Previous HEP

Enter a value regarding the student's previous HEP attendance. Choices are: *Attended Previous HEP*, *Did Not Attend Previous HEP,* and *Unknown.* If you select *Attended Previous HEP,* additional fields appear on the page.

HEP Year

Enter the most recent academic year in which the student was enrolled at the HEP.

Effective Sequence

If the student attended more than one HEP in the same year, use a unique effective sequence to identify each instance. The system populates this field to 1 by default, and then increments the value each time a new row is added with the same year as an existing row.

HEP Student Number

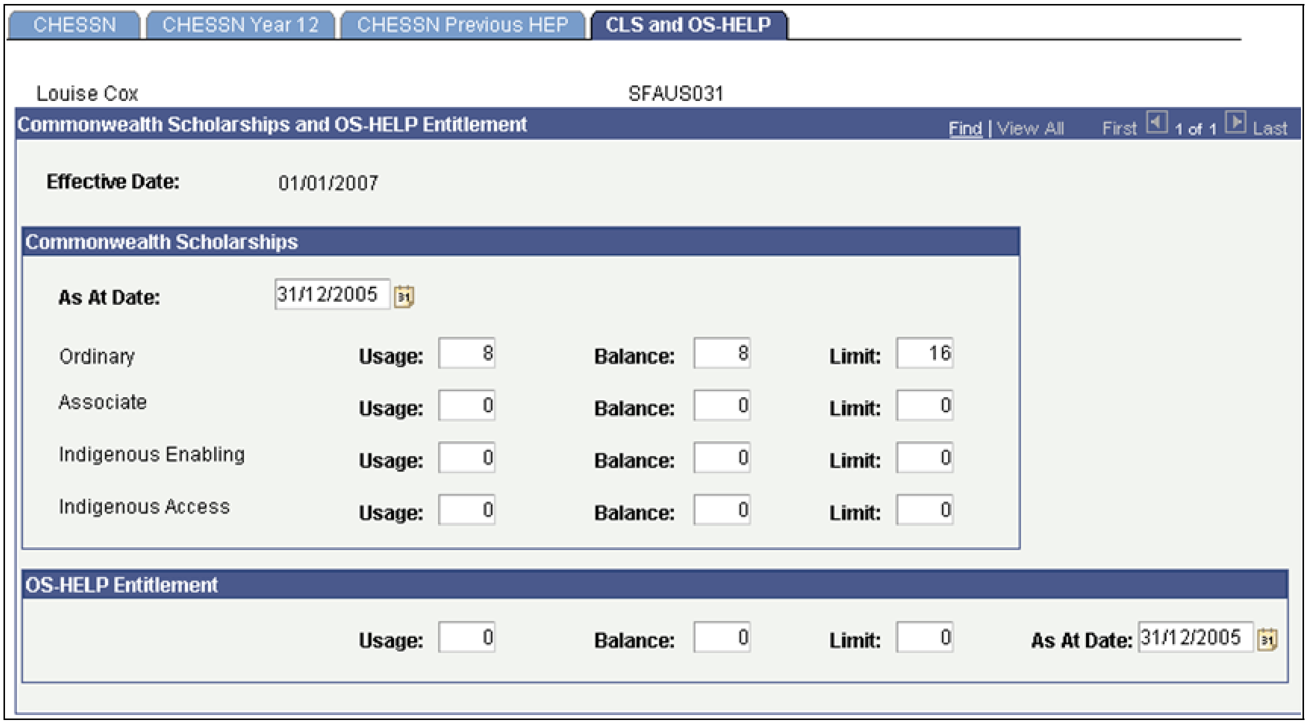
Enter the student's identification number from their HEP.

HEP Code

Enter the HEP code for the organization. The HEP Code value is the DEST institution code used for Element 306.

Entering Commonwealth Scholarships and OS-HELP Entitlement Data

Access the CLS and OS-HELP page (Campus Community, Personal Information (Student), Biographical (Student), Personal Attributes, CHESSN Data, CLS and OS-HELP).



CLS and OS-HELP page

Commonwealth Scholarships

Enter the usage, balance, and limit amounts for the each of the applicable scholarship categories.

As At Data
Enter the date when the scholarship data was received from HEIMS.

Data is considered confirmed by HEIMS as accurate on the date when your institution receives it.

Usage
Enter the number of payments that have been issued to the student.

Balance
Enter the number of payments remaining for the student.

Limit
Enter the maximum number of payments to which the student is entitled.

OS-HELP Entitlement

Enter the student's OS-HELP entitlement usage, balance, limit, and as at date.

Chapter 38

(NZL) Managing NSI Data

This chapter provides overviews of National Student Index (NSI) processing and NSI fields and discusses how to:

- Request National Student Numbers (NSNs).
- Receive NSI data.
- Purge suspense data.
- Process change notifications.
- Review additional NSI data.

Understanding PeopleSoft NSI Processing

The NSI for New Zealand is a database system maintained by the Ministry of Education. The system allocates a unique identifier, an NSN, to every tertiary student and every National Certificate of Education Achievement (NCEA) candidate. The NSN must be included for every student reported to the Ministry of Education in a Single Data Return (SDR) as of April 2003. Including this number in a database allows information about each student to be linked together even if different institutions report the information in different years. The NSI database is a repository of verified student details. You can use verified NSI records as evidence of students' identities rather than having to ask all students to provide documentary evidence such as birth certificates.

Interaction with the NSI is a two-way flow of information. PeopleSoft provides several processes that enable you to collect and pass data back and forth between your PeopleSoft database and the NSI as data is changed, updated, or added.

Note. It is important that you request an NSI website login ID and password from the New Zealand Ministry of Education to access the NSI database, and that you clearly understand the Ministry of Education NSI process before you begin using PeopleSoft NSI functionality. Consult the Guide to Integrating with National Student Index (GINS) on the Ministry of Education website www.minedu.govt.nz. You must manually log onto the NSI website to upload and download NSI files. Your institution must monitor the Ministry of Education website and determine when files are ready to load. PeopleSoft does not offer an automated process. The PeopleSoft solution is based on Version 2.0 – May 2002 of the GINS document.

See www.minedu.govt.nz.

PeopleSoft processes, described in this section, enable you to prepare and exchange data between your PeopleSoft database and the Ministry of Education database. The processes are:

1. Request NSN process (CCNSIRQN), which executes a mass change to identify students, prospects, or applicants who do not have assigned NSNs.
2. Extract NSI process (CCNSIEXT), which extracts data into a file to send to the Ministry of Education.
3. Load NSI Data process (CCNSILOD), which loads data from that extract file into the NSI Suspense Table so you can review it.
4. Post NSI Data process (CCNSIPST), which posts data from the NSI Suspense Table to your PeopleSoft database.
5. Purge NSI Suspense Table process (CCNSIPRG), which purges posted and corrected rows from the NSI Suspense Table.
6. NSI Change Notification process (CCNSICHG), which posts the Ministry of Education changes to NSI records for individuals who are active at your school.

PeopleSoft temporarily stores NSI data in the NSI Suspense Table. Use the suspense table as a central point to monitor data to send to NSI and the results data that NSI sends back to you. Outgoing Data and Incoming Data pages in the suspense table enable you to view data according to direction and to compare the data to make sure that the correct data is loaded for the right person.

A status assigned to each record in the suspense table enables you to determine where the record is in the process. For outgoing data, the status indicates if the data is ready to extract and send to the Ministry of Education or if it has been posted and is ready to purge from the suspense table. For incoming data, the status indicates if the data has been posted to your database or if an error occurred during processing.

The Outgoing Data page is populated with data from the Biographical Details and Regional pages when the Request NSN process (CCNSIRQN) runs or when a change is made to an NSI field for any individual who is NSI processing enabled (the NSI Processing Enabled check box is selected on the Regional page). If the individual record already exists on the Outgoing Data page awaiting assignment of an NSN, the existing data is updated. If the individual already has an NSN, the updated record is added to the Outgoing data page so that the changes can be reported to NSI. The Incoming Data page is populated when you run the Load NSI Data process to load data from the result files that you receive from NSI.

The first step in the overall process is to identify students, prospects, or applicants who do not have an assigned NSN and for which, based on certain criteria, you want to request an NSN from the Ministry of Education. Run the Request NSN process (CCNSIRQN) to execute a mass change to identify these individuals according to criteria that you specify. Modify the sample mass change definitions to reflect the criteria that your institution uses to define prospects, applicants, and students. Do not attempt to rename the mass change definitions. Then, run the process to execute the mass change.

When the request process runs, it copies data for the individuals identified in the mass change from the Add/Update a Person component (specifically from the Biographical Details and Regional pages) to the Outgoing Data page of the suspense table. The process inserts records with the most current file numbers on the Campus Community Installation component, and displays a status of *Ready for Extraction.* You can view the Outgoing Data page to see the results of the request process.

Also, as the request process adds the record to the Outgoing Data page of the suspense table, it sets that record to NSI processing enabled (by selecting the NSI Processing Enabled check box on the Regional page of the Add/Update a Person component). As long the record remains NSI processing enabled, the system will update the outgoing suspense data whenever a change is made to any NSI field. This automatic update ensures that the extract process captures the most up-to-date data to send to the Ministry of Education.

Note. The Ministry of Education requires that you notify them if changes are made to any NSI field. If you make a change to an NSI field when the NSI Processing Enabled check box is not selected, you will need to send the NSI an Update Insert Request to notify the NSI database that the data was changed and verified.

To extract outgoing data from the suspense table into a delimited file to send to the Ministry of Education, run the NSI Extraction process (CCNSIEXT). The process extracts data for IDs with a status of *Ready for Extraction* on the Outgoing Data page and changes the status to*Extracted* when the extract file is created. You must manually upload this file to the NSI website. The Ministry of Education then processes the IDs and posts the results on their website in a similar format, ready for you to download manually.

To receive data from the Ministry of Education, you must download the appropriate NSI Result file from the Ministry of Education website and then run the Load NSI Data process (CCNSILOD) to load data from that file. You can view results of the upload process on the Incoming Data page of the suspense table. The upload process displays a status of *Ready to Post* if it finds a perfect match between the Ministry of Education data and the record sent from your PeopleSoft database, or displays a status of *Select a Match* if it finds one or multiple possible matches between the Ministry of Education data and records in your database. In the latter case, it is your responsibility to evaluate the potential match and determine if one matches your data or if a new NSN should be created. If an error occurred (for example, the date of birth and gender information was not sent), the *Error* status appears.

To post incoming data from the suspense table to your PeopleSoft database, run the Post NSI Data process (CCNSIPST). The process posts only the rows on the NSI Suspense component with a status of *Ready to Post* and changes the status to *Posted.*

To purge processed rows from the suspense table, run the Purge NSI Suspense Table process (CCNSIPRG). The purge process deletes rows with a status of *Posted* from the NSI Suspense component and deletes rows with a status of *Error Corrected.*

Note. You can run the purge process at any time. However, you must run the extract, load, and post processes in just that order for each file number that you upload from NSI.

To receive the Ministry of Education changes to NSI records for individuals who are active at your school, run the NSI Change Notification process (CCNSICHG).

Here is an example of NSI data management:

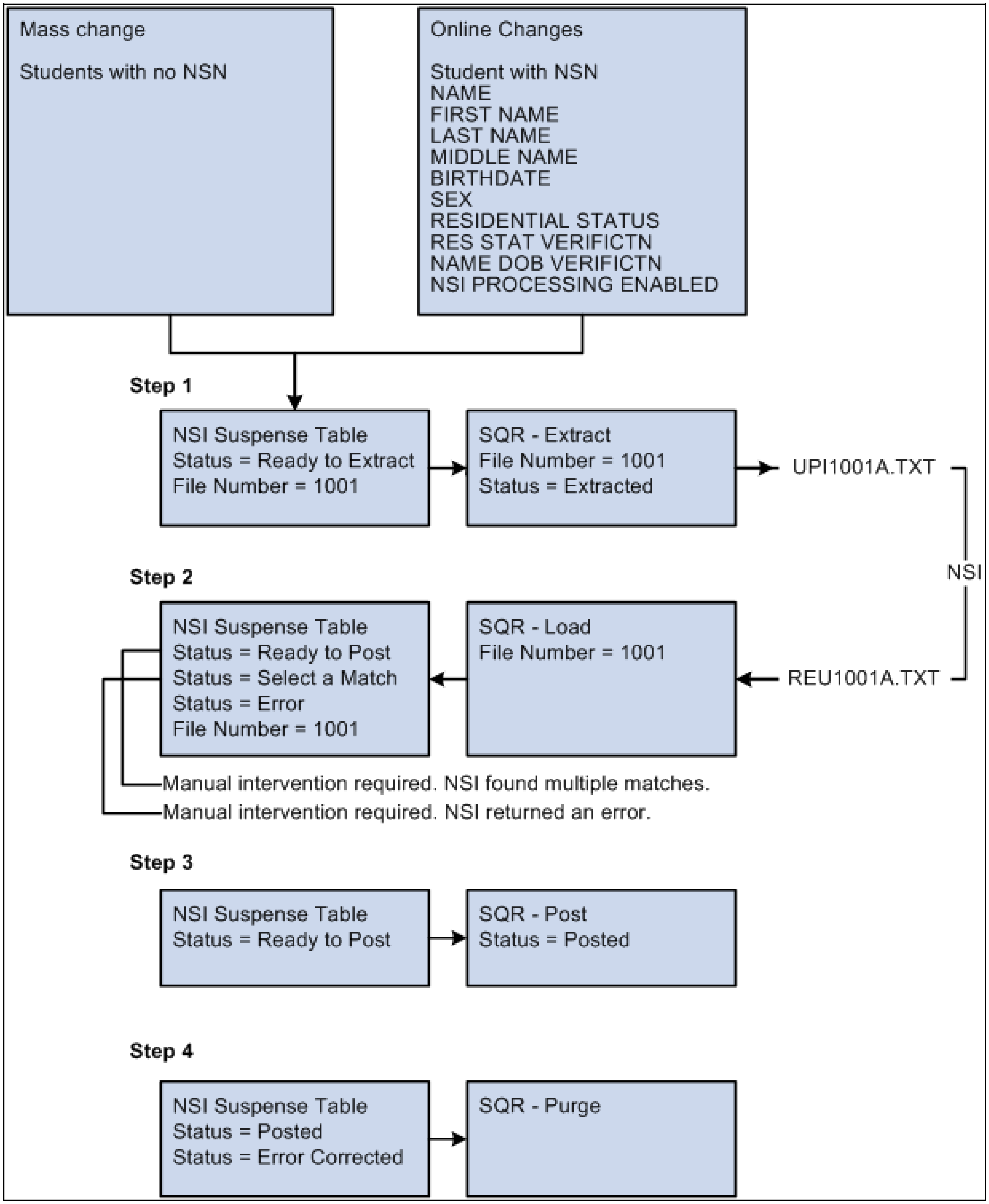
On Monday, you run the request NSN process (CCNSIRQN). The process executes the mass change for students and retrieves a record for ID 1234, Mary Smith, birthdate 01/01/1980. The request NSN process adds Mary's information to the NSI Suspense table Outgoing Data page with a file number of 0007. Mary's record is NSI processing enabled. The extract process runs at the end of the day, extracting all IDs associated with file number 0007 to send to NSI. You have requested an NSN for Mary and are waiting for the results from NSI.

On Tuesday, you realize that Mary's birthdate is actually 01/01/1982. You access the Biographical Details page and change Mary's birthdate from 01/01/1980 to 01/01/1982. Because Mary's record is NSI processing enabled and birthdate is a field included in NSI records, the system automatically adds a new row to the NSI Suspense table for Mary with a file number 0008. The extract process runs at the end of the day, extracting file number 0008 to send to NSI.

On Wednesday, you download the NSI Result file for file number 0007 (REU0007a.txt) and upload data from that result file into your database. Mary now has an NSN but her birthdate is 01/01/1980.

On Thursday, you download the NSI Result file for file number 0008 and upload data from that result file into your database. Mary now has an NSN and her correct birthdate of 01/01/1982. The upload process overrode the data with the latest change to the birthdate field. The suspense table helps you maintain the most current data while you wait for data to be processed by the NSI database.

This diagram provides an overview of the flow of the NSI processes. It shows the cause and effect of the status of a change in the NSI Suspense Table and the appropriate SQR action.



Overview of PeopleSoft NSI business process

Understanding NSI Fields

An NSI record includes the following fields. Fields marked as required are necessary to create an active NSI record for students. Name and date of birth are necessary to create a partial record:

NSI Field Name	***PeopleSoft Field Name***	***Status/Description***
NSN	SCC_NSN	Required.
Surname	LAST_NAME	Required. Name Type: Primary
Forename1	FIRST_NAME	Required. Name Type: Primary
Forename2	MIDDLE_NAME	Required. Name Type: Primary, first middle name.
Forename3	N/A	N/A
Preferred name indicator	SCC_PREF_NAME_IND	N/A
DoB (date of birth)	BIRTHDATE	Required.
Gender	SEX	N/A
NZQA paid (New Zealand Qualifications Authority paid)	SSR_NZQA_PAID	N/A
Residential Status	SCC_RESIDENTL_STAT	Required.
Record Status	SCC_STDNT_STAT_NSI	N/A
DoD (date of death)	DT_OF_DEATH	N/A
Alternate Surname	N/A	N/A
Alternate forename1	N/A	N/A
Alternate forename2	N/A	N/A
Alternate forename3	N/A	N/A
Alternate preferred name indicator	N/A	N/A
Name dob verification	SCC_NM_DOB_VERFCTN	N/A

NSI Field Name	PeopleSoft Field Name	Status/Description
Residential status verification	SCC_RES_ST_VERFCTN	N/A

Requesting NSNs

This section discusses how to:

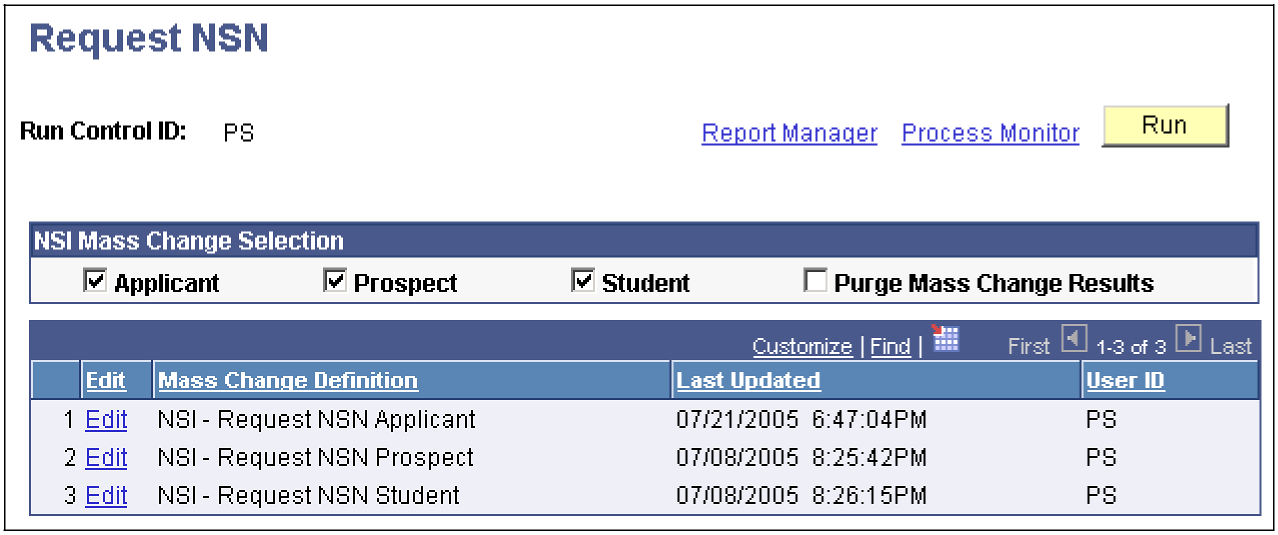
- Identify individuals without NSNs.
- View outgoing suspense data.
- Extract data to send to NSI.
- Send the extract file.

Pages Used to Request NSNs

Page Name	Definition Name	Navigation	Usage
Request NSN	SCC_REQUEST_NSN	Campus Community, National Student Index NZL, Process NSI, Request NSN	Run the Request NSN process (CCNSIRQN) to identify prospects, applicants, and students who need an NSN or to purge results from a previous run.
Outgoing Data	SCC_SUSPENSE_NSI	Campus Community, National Student Index NZL, NSI Suspense	Review outgoing data before extracting it to send to the Ministry of Education.
Extract NSI Data	SCC_RUN_EXTRCT_NSI	Campus Community, National Student Index NZL, Process NSI, Extract NSI Data	Run the NSI Extraction process (CCNSIEXT) process to extract outgoing data to send to NSI.

Identifying Individuals Without NSNs

Access the Request NSN page (Campus Community, National Student Index NZL, Process NSI, Request NSN).



Request NSN

The Request NSN process (CCNSIRQN) executes a mass change to identify individuals in your database that need NSNs or to purge results of a previous run of the process. The process writes (or in the case of a purge, deletes) data for the resulting individuals on the Outgoing Data page of the NSI Suspense Table, giving them a status of *Ready for Extraction.* The process inserts records with the most current file number into the suspense table and selects the Inserted by Mass Change check box.

As the process copies the information from your database, it also selects (or in the case of a purge, clears) the NSI Processing Enabled check box on the individual's Regional page of the Add/Update a Person component. The NSI Processing Enabled check box sets the system to automatically report online changes made to an individual's NSI fields so that you can extract the most up-to-date data to send to the Ministry of Education.

Note. The NSI Processing Enabled check box on the Regional page of the Add/Update a Person component becomes unavailable once it is selected. The only time that a selected, unavailable check box becomes cleared and available is when the Request NSN process is run with the Purge Mass Change Results option selected to purge results of a mass change.

Applicant, Prospect, and **Student**

Select the types of individuals for which you want to request NSNs from the NSI database. You can select one or more check boxes at the same time.

When you run the process, the system copies appropriate biographical and regional data for each individual onto the Outgoing Data page of the Suspense NSI component in preparation for extracting and sending the data to NSI.

Purge Mass Change Results

Select to purge results of the Request NSN process (CCNSIRQN). When the process runs with the check box selected, the system removes all of the records added to the suspense table for the most current file number where Insert by Mass Change is selected and the suspense status is still *Ready for Extraction.* It also clears the NSI Processing Enabled check box on the Regional page for those records.

If you ran mass change by mistake or with the wrong criteria set, you can use this to purge those records.

Note. To purge processed records from the suspense table, run the NSI Purge process (CCNSIPRG).

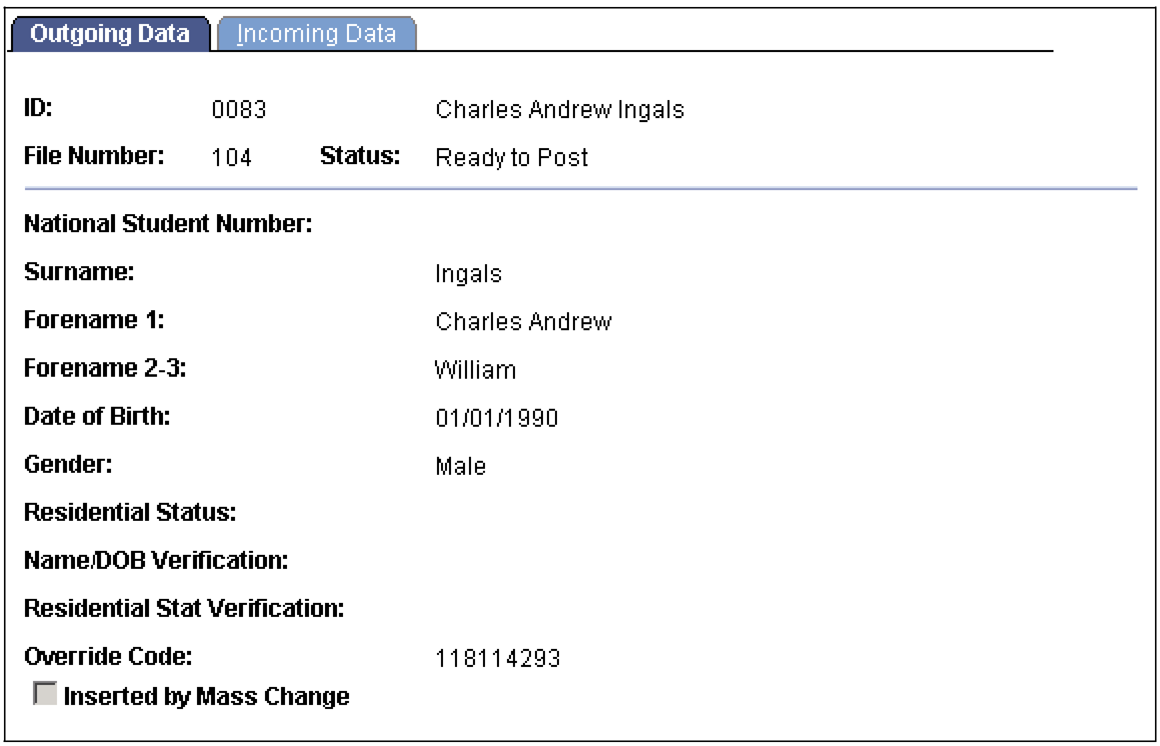
Edit

Click to modify the mass change criteria and regenerate the mass change.

Warning! We recommend that you generate mass changes prior to running the request process to ensure that the mass change process uses data as of the current date.

Viewing Outgoing Suspense Data

Access the Outgoing Data page (Campus Community, National Student Index NZL, NSI Suspense).



Outgoing Data page

This page is for viewing purposes only. You cannot enter data here.

The Outgoing Data page is populated with data from the Biographical Details and Regional pages when the Request NSN process (CCNSIRQN) runs.

When the NSI Processing Enabled check box is selected on the Regional page of the Add/Update a Person component and online changes are made to any NSI field for an individual, the system also automatically updates the Outgoing Data page. If the individual record is already included in the Outgoing Data page awaiting assignment of an NSN and a change to an NSI field is made, the system automatically updates the record with the changed data. If not, the system adds the record to the Outgoing Data page.

File Number

Displays the file number that was current when the student, applicant, or prospect's ID was added to the suspense table.

Status

Indicates where the record is in the process.

The status of *Ready for Extraction* is the initial status, and it is given when an ID is added to the NSI Suspense Table. The subsequent extract, load, post, and purge processes display the current status to indicate where the record is in the process.

Values include:

Ready for Extraction: File is ready for extraction process. The Extract NSI Data process (CCNSIEXT) only extracts these records and data is included in the extract file to send to the Ministry of Education as part of the Update Insert Request (UPI Request).

Extracted: The extraction process has run and the UPI Request file is ready to send to the NSI or your institution is waiting to receive the result file

Ready to Post: The Result file is received from NSI and data is loaded in the suspense table by the Load NSI Data process (CCNSILOD). Only one match is found in the NSI database and the individual record is now ready to post in the school database.

Select a Match: The Result file is received from NSI and data is loaded in the suspense table by the Load NSI Data process (CCNSILOD). NSI returned multiple matches for the record sent in the UPI Request. You must manually select which match to use.

Error: The Result file is received from NSI and data is loaded in the suspense table by the Load NSI Data process (CCNSILOD). An error occurred while NSI was processing the individual record. You must find the error and correct it.

Error Corrected: The Load NSI Data process (CCNSILOD) returned an error, you corrected it, and selected the Error Corrected check box on the Incoming Data tab.

Note. The rows with the status *Error Corrected* are deleted from the suspense table the next time the Purge NSI Suspense Table process (CCNSIPRG) runs.

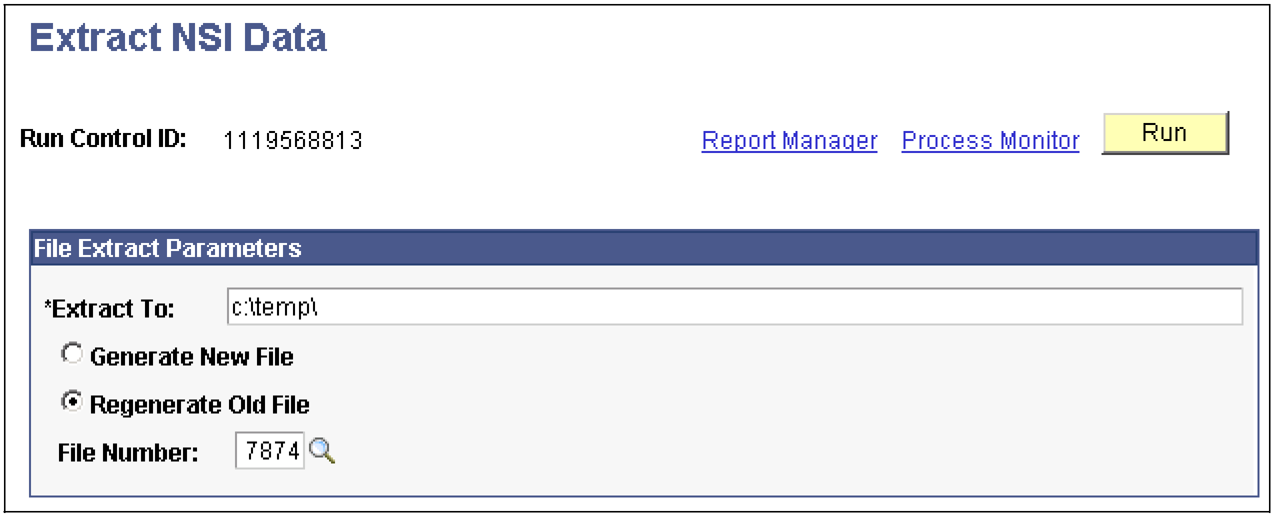
Posted: The Post NSI Data process (CCNSIPST) ran and the row is now ready to be purged from the suspense table. These are translate values and must not be changed.

Inserted by Mass Change

The process selects this if the record was added to the suspense table through the mass change executed in the Request NSN process.

Extracting Data to Send to NSI

Access the Extract NSI Data page (Campus Community, National Student Index NZL, Process NSI, Extract NSI Data).



Extract NSI Data page

The NSI Extraction process (CCNSIEXT) extracts data with a status of *Ready for Extraction* from the Outgoing Data page of the NSI Suspense Table into a file ready to send to NSI. When the process completes, extracted records have a status of *Extracted.*

Extract To

Enter the path to the directory where you want the process to place the extract file.

Generate New File

Select to generate an extract file for the first time. The process extracts the data in the NSI suspense table with the most current file number assigned on the Extensions page of the Campus Community Installation component. The Extract NSI Data process (CCNSIEXT) uses the file number to create the file name.

When the Extract NSI Data process (CCNSIEXT) finishes running, it increments by one, the file number on the Extensions page.

Regenerate Old File

Select to regenerate a file. Once selected, the File Number field appears. Select the file number that you want to regenerate.

You can only regenerate the files for which the data in the suspense table is in *Extracted* status. Files with data that has loaded or posted cannot be regenerated.

Example: How the Extract NSI Data Process Works

If the current file number in the Extension page of the Installation Default CC component is 0001, the NSI Extraction process (CCNSIEXT) creates a file name of UPI0001a.txt where UPI is the code for the NSI process Update Insert Request. 0001 is the unique file number, "a" represents an alphabetic character used to split a file into more than one part if it includes more than 2,000 rows. The maximum number of rows per file recommended by the Ministry of Education is 2,000. A file with 5,500 rows is identified as follows:

- UPI0001a.txt – 2,000 rows
- UPI0001b.txt – 2,000 rows
- UPI0001c.txt – 1,500 rows

Note. If your file includes more than 52,000 characters rows (26 alphabetic letters times 2000 rows), you must manually give the remaining files a different name. The NSI Extraction process (CCNSIEXT) will create 26 files and will save the rest of the data into a file call UPIEXTRa.txt. Manually split this file to have no more than 2,000 rows in each of them. You can name the files using the same concept as the NSI Extraction process (CCNSIEXT) used. For example, UPIEXTRa.txt, UPIEXTRb.txt, etc. You will need to make sure you add the proper header and footer to the files you create.

Also, each time you must send a student's record to the Ministry of Education, the current file number is assigned to it. The next time the extract process runs, it extracts all the data for the students tied to the current file number. In the example above, the NSI Extraction process (CCNSIEXT) process creates a file named UPI0001a.txt and extracts data for all records with the assigned file number of 0001.

Every time the NSI Extraction process (CCNSIEXT) runs, the file number in the Installation CC Table increases by an increments of one. The next changes made to student, applicant, or prospect's record is associated with the next file number (0002) and the next extract file to run will create the UPI0002a.txt file.

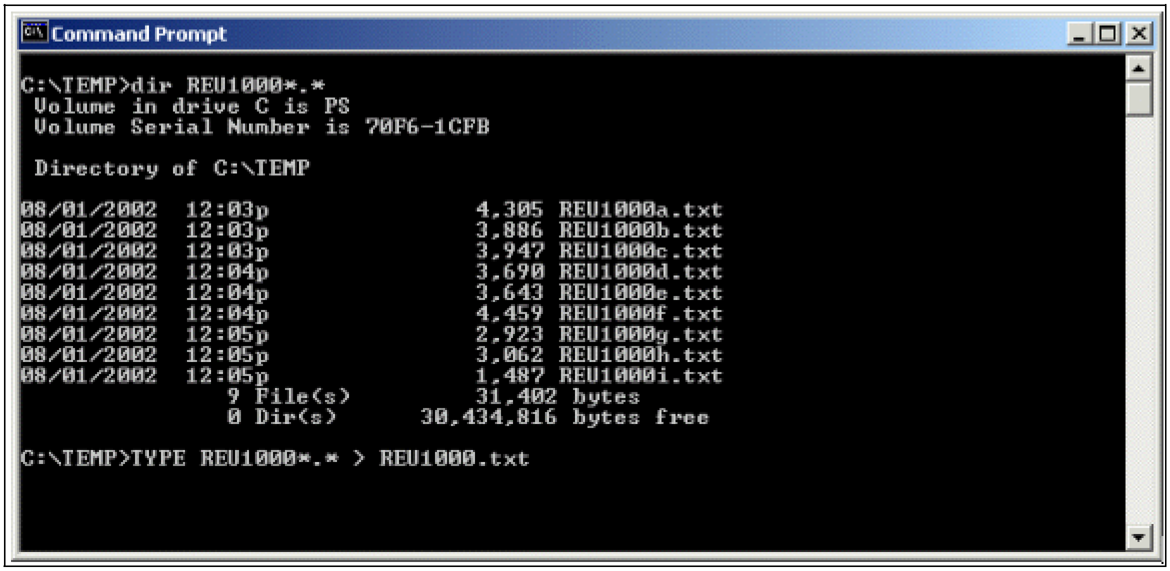
Once the data is extracted, you can login to the Ministry of Education website and upload the extract file(s). Make sure you upload all the extract files created for a same file number. For example, if the NSI Extraction process (CCNSIEXT) created UP1000a.txt, UP1000b.txt and UP1000c.txt, it is your responsibility to verify if more than one file got created and to upload all of them to the NSI website. You must then monitor the site for the results file(s) that NSI will provide for you. Based on NSI requirements, if you sent a file called UPI0001a.text, NSI will send the results file with a corresponding name: In this case it will be REU0001a.txt. REU means Result for UPI request, 0001a is the file identifier you used in your extract file, and txt is the delimited file format. In the case mentioned above, NSI will return the files called REU0001a.txt, REU0001b.txt and REU0001c.txt. It is again your responsibility to download all the result files for a same file number.

When you download result files from the NSI website, download them into one of your directories, for example c:\temp\.

If the extract process created only one file, for example UPI0001a.txt, after you download the results file for it (REU0001a.txt), you are able to load the results file (REU0001a.txt) directly into the NSI Suspense table by using the NSI UPI Load Process (CCNSILOD).

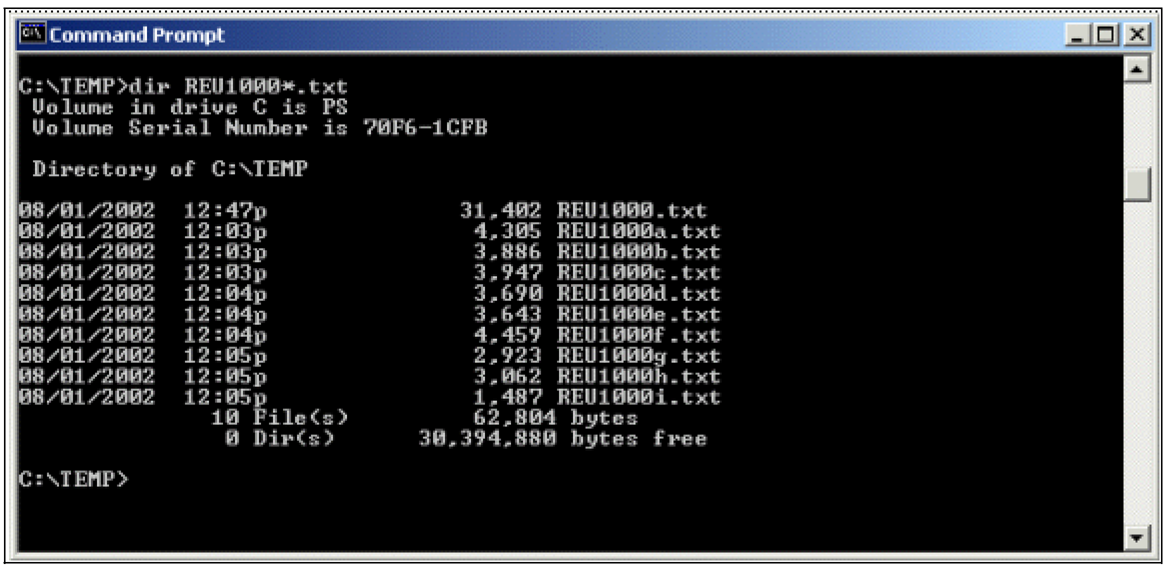
If the extract process created more than one file, for example UPI1000a.txt, UP1000b.txt and UP1000c.txt, then you must merge the files before you can load them to the NSI Suspense table.

Warning! You should merge the files only if they have the same file number. For example UP1000a.txt, UP1000b.txt and UP1000c.txt have all the same file number, which is 1000. Merging files with different file numbers causes errors when you run the NSI UPI Load process (CCNSILOD).



Example of multiple extracted files (same file number, but with alphabetical designator)

Once you process the command, you can review that the new file has been created.



Example of the merged file added with no alphabetical designator

Use the name of the merged file to load data onto the Incoming Data page of the NSI Suspense table.

Sending the Extract File

Upload the UPI extract file (for example: UPI0001a.txt) to NSI from your server.

Consult the Ministry of Education website for instructions on how to upload files to NSI.

See www.minedu.govt.nz.

Receiving NSI Data

This section discusses how to:

- Download data from the NSI database.
- Loading results data.
- Review incoming suspense data.
- Post NSI data.

Pages Used to Receive NSI Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Load NSI Data	SCC_RUN_LOAD_NSI	Campus Community, National Student Index NZL, Process NSI, Load NSI Data	Run the Load NSI Data process (CCNSILOD) to upload data from the NSI database onto the Incoming Data page of the NSI Suspense Table to review before posting it to your Campus Solutions database.
Incoming Data	SCC_UPDATES_NSI	Campus Community, National Student Index NZL, NSI Suspense, Incoming Data	Review NSI data received and temporarily stored data in the NSI Suspense Table before posting it to your database.
NSI Returned Data Details	SCC_UPDTES_NSI_SEC	Click the Details button on the Incoming Data page.	View additional details of information received from NSI.
Post NSI Data	SCC_RUN_POST_NSI	Campus Community, National Student Index NZL, Process NSI, Post NSI Data	Run the Post NSI Data process (CCNSIPST) to post data received from NSI.

Downloading Data from the NSI Database

After the Ministry of Education has processed your extract file, download the REU result file (for example: REU1001a.txt) from the NSI to your server.

Consult the Ministry of Education website for NSI result file instructions.

See www.minedu.govt.nz.

Loading Results Data

Access the Load NSI Data page (Campus Community, National Student Index NZL, Process NSI, Load NSI Data).

Load NSI Data

The Load NSI Data process (CCNSILOD) loads data from an NSI result file to the NSI Suspense Table. The load process writes the data to the Incoming Data page, giving each impacted record a status of *Ready to Post, Select a Match,* or *Error.*

Import From — Enter the path to the directory where you downloaded the file from the NSI website.

File Name — Enter the name of the file to load.

You can load a file only after all rows in of the previous files have a status of *Posted*, *Error Corrected*, or *Error*.

Warning! The load process will not run if it finds previous files with rows marked *Extracted*,*Ready to Post*, or *Select a Match.* In the latter case, you must select a match and run the Post NSI Data process (CCNSIPST) before you can run the Load NSI Data process (CCNSILOD). This protects the load data that has not yet been processed.

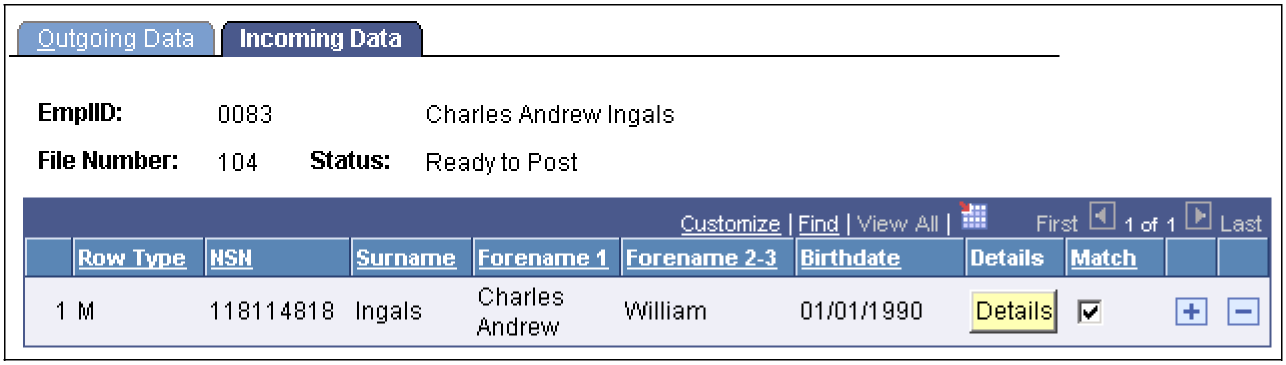
You cannot load a file with a number out of sequence. You can load NSI results only for the oldest file number in the NSI Suspense Table with the status of *Extracted.* This prevents you from loading data for extract files that you sent to NSI more recently. Files that you send to NSI must be processed in sequential order. Use the file number in the NSI Suspense Table to identify which result file to load first.

For example, if files numbered 0008 and 0009 have a status of *Extracted* in the NSI Suspense Table, and you try to load file 0009 before 0008, the Load NSI Data process returns an error. You can extract multiple files with different numbers, but you must load them in numerical order. You must complete the process of loading a file before you can load the next file. That file must have only rows with the status of *Extracted, Loaded*, or *Posted* before you can load the next file.

If a file number exists with status rows of *Extracted*,*Ready to Post*, or *Select a Match*, and you try to load a file with a higher number, the SQR aborts and displays the error "You are trying to load File Nbr XXXX, but you have older file(s) that have not been POSTED yet." This prevents you from posting data from the file with the higher number before posting the file with a lower number.

Reviewing Incoming Suspense Data

Access the Incoming Data page (Campus Community, National Student Index NZL, NSI Suspense, Incoming Data).



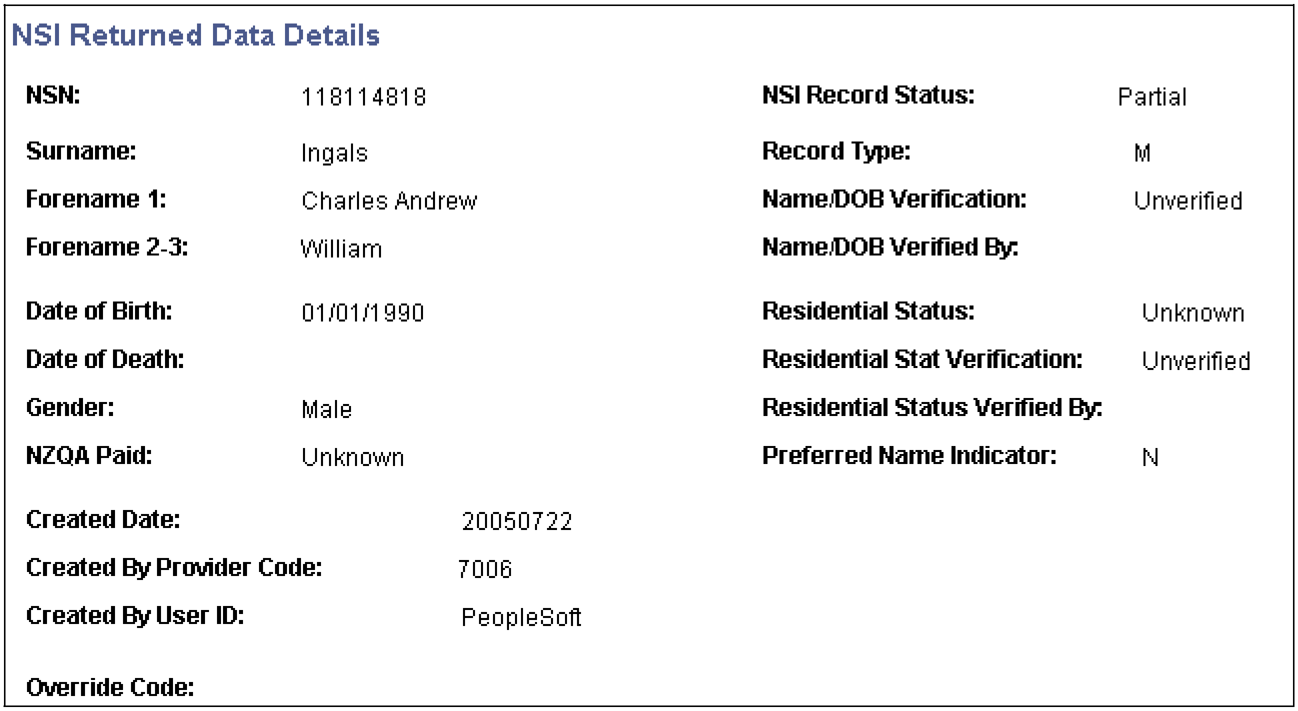
Incoming Data page

The Incoming Data page is populated with data from NSI when the Load NSI Data process (CCNSILOD) runs.

Status Indicates where the record is in the process. Status values here are the same as status values on the Outgoing Data page of the NSI Suspense Table component.

Row Type	Indicates the type of row returned by NSI. The system displays different fields based on the row types returned. Row types include: *M* (match): When only an *M* row is returned, the NSI did not find a match in its database, so it created a record and assigned an NSN. In this case the system selects the Match check box and sets the status to *Ready to Post.* *S* (select a match): When an *M* row and one or more *S* rows are returned, NSI found possible matches. The system calculates and displays Match Indicator and Score values to help you determine which match to use. Click the Details button to view details of each row. If you determine that one of the *S* rows data is a match, select the Match check box for that row. The system changes the status to *Ready to Post.* When the Post NSI Data process runs, the process copies the information from this row to the Biographical Data component for the ID. If you determine that none of the *S* rows is a match for the individual, select the Match check box for the *M* row to confirm that this is the student who needs an NSN. The system changes the status to *Ready to Post.* When the Post NSI Data process runs, the process reinserts the record in the NSI Suspense Table with a status of *Ready for Extraction.* The record is reinserted and sent to NSI the second time because an *M* row, when accompanied by one or multiple *S* rows, has no NSN is associated. Instead, the NSI assigned an override code. The override code "reserves" an NSN. When NSI receives the individual's record a second time, it uses the override code to create the NSN. The override code is among the details displayed on the NSI Returned Data Details page. *E* (error): When an *M* row and an *E* row are returned, the NSI database encountered an error. Click Details for a description of the error. (A list of possible errors is provided at the end of this section.) You must correct the error and then select the Corrected check box to change the status to *Error Corrected.*
Match Indicator	Appears only when NSI returns a record with an *M* row and one or more *S* rows. Displays the name type on which the NSI system found a match in the NSI database. The values are *Main, Alternate, Merged,* and *Alt Merged.* These values are translate values and should not be modified. Always select a row that has a *Main* name. If not, you will load into your database as the Primary name, a name that NSI considers an alternate name in their database.
Surname, Forename1, Forename2, Forename3, and **Birthdate**	Displays the name data and the date of birth with which NSI created the record.

Score	Appears only when NSI returns a record with an *M* row and one or more *S* rows. Indicates the accuracy of the returned record. The NSI search software determines this score and it is based on how close the returned record is to the original search criteria. The closer the files are, the closer the score is to 100. However, a score of 100 doesn't guarantee that the data you sent has been perfectly matched in the NSI database. In the sample page, the name Jim Taylor was found and shows a score of 100. The birthdate is different. Therefore, it might be two different individuals.
Details	Click to access the NSI Returned Data Details page where you can review more details about that row.
Match	The system automatically selects this if the record is a perfect match, or if among multiple possible matches, one and only one S row is returned with a score of 100. If multiple *S* rows are returned with a score of 100, you must select this check box for the row that you want to post. When selected, the status changes to *Ready to Post.* The Post NSI Data process (CCNSIPST) posts the rows in the suspense table that have a *Ready to Post* status.
Corrected	Appears only when NSI returns a record with one or more *E* (error) rows. A description of the error appears on the NSI Returned Data Details page. After you correct an error, select this check box to change the status to *Error Corrected* so that you can identify which errors you have corrected and which still need to be corrected. The Purge NSI Suspense Table process (CCNSIPRG) deletes rows in the suspense table with a status of *Error Corrected.* Also, by correcting an error in an NSI field on a record with the NSI Processing Enabled check box selected on the Regional page of the Add/Update a Person component, the system automatically inserts a new row in the NSI Suspense Table with the correct data and a status of *Ready for Extraction* so that the corrected data will be extracted to send to NSI the next time the extract process runs. **Note.** In the case of a corrected error, the individual record appears in the suspense table twice—once with the status of *Error Corrected* and once with the status of *Ready for Extraction.* The file numbers, however, are different.



NSI Returned Data Details

NSN:	118114818	NSI Record Status:	Partial
Surname:	Ingals	Record Type:	M
Forename 1:	Charles Andrew	Name/DOB Verification:	Unverified
Forename 2-3:	William	Name/DOB Verified By:	
Date of Birth:	01/01/1990	Residential Status:	Unknown
Date of Death:		Residential Stat Verification:	Unverified
Gender:	Male	Residential Status Verified By:	
NZQA Paid:	Unknown	Preferred Name Indicator:	N
Created Date:	20050722		
Created By Provider Code:	7006		
Created By User ID:	PeopleSoft		
Override Code:			

NSI Returned Data Details page

This page is for viewing purposes only. You cannot enter data here.

Override Code

An override code is returned only when NSI returns an *M* row with one or more *S* rows.

If you select the M row to use, the individual needs to be sent a second time to the NSI to request the NSN. When the row is submitted again, NSI uses the override code to create the NSN. When the information is sent back to you, NSI will not include any S rows because you already confirmed the row to use for the NSN assignment.

Record Type

Indicates the type of row that was returned by NSI.

M row details include the data that you sent to NSI and additional data received from NSI for that record. If an *M* row does not include an NSN, it could be because NSI found more than one individual who may be the same as the one requested.

S row details include data for a person who the NSI system has determined could be a match for the original data that you sent.

E row details include the error code. For example, the error code might indicate that the date of birth was not supplied to the NSI database.

A common error is "Cannot replace verified data with unverified data." To correct this error, you must manually access the NSI website and copy the student name to your database and ensure that the correct NSN is entered. All other NSI data can be overwritten in your database (gender, date of birth, residential data, and verification fields).

Note. If the NSI database contains verified data for an individual, update your database with the NSI data. Because NSI is a central place to store student information, rely on the validity of the NSI data.

NSI Error Codes

This table lists the NSI decimal error codes and their descriptions. Consult the Ministry of Education and the GINS document if further information is required:

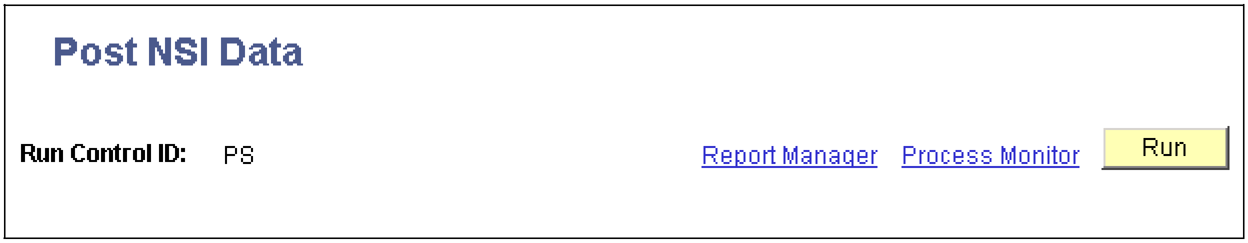
Value (Decimal)	***Description***
256	%1 is invalid.
257	Mandatory field(s) %1 were not supplied. Please enter values for the following fields: %1
258	Please supply an NSN(s).
272	Invalid character in name field.
273	Verification flag set without corresponding data.
274	Cannot replace verified data with unverified data.
275	Invalid Verification Flag.
276	Verification Flag cannot be set to BDM.
277	Cannot update BDM data without changing Verification Flag.
278	Hyphen and Apostrophe cannot be used without another character.
279	Cannot replace verified flag with unverified.

Value (Decimal)	***Description***
288	Invalid gender.
304	Invalid date format.
305	Date of Death must be later than Date of Birth.
306	Residential status is invalid.
309	Preferred name indicator is invalid.
320	Preferred name indicator is invalid.
321	Preferred name indicator set for more than one name.
336	Invalid NSN.
337	NSN does not exist.
339	Invalid Provider Code.
369	BDM Verified fields cannot be changed.
370	Cannot update an inactive student record.
409	Unexpected validation Error.
416	Incorrect File Format.
417	Incorrect Format for file footer record.
418	Incorrect Record Format.
421	Records in footer don't match the records in file.
512	Security Error: %1.
515	Organization is not valid for user.
516	First time access, please go to website to change password.
529	Access Denied.
640	General Security Failure.
665	SIA Failure: %1.
768	Unexpected Error %1.

Value (Decimal)	***Description***
817	Manual intervention required.
822	NSN records %1 have got NZQA paid flag set to Y or N.
848	Rollback denied - no slaves exist.
849	Failed to rollback the master record.
865	Missing User ID and/or Provider Code.
1282	NSN record has not been modified.

Posting NSI Data

Access the Post NSI Data page (Campus Community, National Student Index NZL, Process NSI, Post NSI Data).



Post NSI Data page

The Post NSI Data process (CCNSIPST) posts data with the status of *Ready to Post*, from the NSI Suspense Table to your PeopleSoft database. The process posts data on the Biographical, Regional, and Additional NSI Data pages. The process also changes the status to *Posted* for each record it successfully posted.

Warning! Before posting, for each record with a status of *Select a Match*, you must select a match to use by checking the Match check box for that row on the Incoming Data page of the suspense table.

Purging Suspense Data

This section discusses how to purge data from the NSI Suspense Table.

Page Used to Purge Suspense Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Purge NSI Data	SCC_RUN_PURGE_NSI	Campus Community, National Student Index NZL, Process NSI, Purge NSI Suspense Table	Run the Purge NSI Suspense Table process (CCNSIPRG) to purge data from NSI Suspense Table.

Purging Data from the NSI Suspense Table

Access the Purge NSI Suspense Table page (Campus Community, National Student Index NZL, Process NSI, Purge NSI Suspense Table).

Purge NSI Suspense Table page

The Purge NSI Suspense Table process (CCNSIPRG) purges NSI data from the NSI Suspense Table. The process purges rows with a status of *Posted* and *Error Corrected* on the NSI Suspense Table component.

Processing Change Notifications

This section discusses how to:

- Download change notifications from NSI.
- Upload and post NSI change notifications.

Page Used to Process Change Notifications

Page Name	*Definition Name*	*Navigation*	*Usage*
NSI Change Notification	SCC_RUN_CHANGE_NSI	Campus Community, National Student Index NZL, Process NSI, NSI Change Notification	Run the NSI Change Notification process (CCNSICHG) to receive changes from NSI.

Downloading Change Notifications from NSI

Download the NSI Change Notification file (for example: REC12345.txt) from NSI to your server. You can then upload the file and post the changes from the change file to your database.

Note. You can manually download the NSI Change Notification file from the NSI website or have the NSI system automatically send the file directly to your institution.

Warning! NSI can provide two different formats for change notification result files: delimited text file and XML. The PeopleSoft batch process accepts only delimited text files. Contact NSI to let them know that you use delimited text files – .txt. If you do not notify them, NSI might send you result files in XML format and you will not be able to load the data in your PeopleSoft database.

Consult the Ministry of Education website for NSI Change Notification instructions.

See www.minedu.govt.nz.

Every four months, the Ministry of Education performs an update of the *active at* links from data reported in Single Data Returns (SDRs) and produces an NSI Change Notification file.

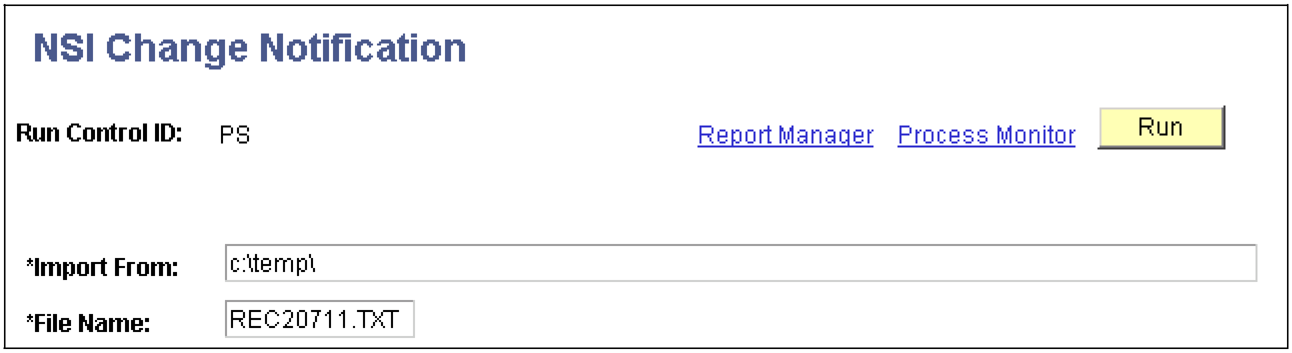
The Ministry of Education reports changes made to the following fields: First Name,Middle Name, Last Name, Date of Birth, Gender, Data of Death,NSI Record Status, Residential Status,Residential Status Verification, Name/DOB Verification,NZQA Paid, Preferred Name Indicator, Last Modified by Provider Code, Last Modified Date, or Changed Field Indicator.

The NSI uses the Change Notification process to send your institution any changes made to NSI student records that are marked as *active at* your school. When a school adds or updates an NSI student record, that student becomes active at that school. The Change Notification process notifies any *active at* schools when changes are made to an NSI record. Change notifications applicable to your school are available for viewing on the NSI website. For example, if NZQA advises that a student has paid his ROL registration fee, all the schools at which the student is recorded as *active at* are notified.

If an individual dies, the change notification process is used to inform all schools that are recorded in the NSI system as having an association with that student.

Uploading and Posting NSI Change Notifications

Access the NSI Change Notification page (Campus Community, National Student Index NZL, Process NSI, NSI Change Notification).



NSI Change Notification page

The NSI Change Notification process (CCNSICHG) uploads data from an NSI Change Notification file and posts the changes directly to records and fields in your database. The data is not written to the suspense table.

Warning! If the NSI Change Notification process (CCNSICHG) encounters any problems loading the data, it will not abort. You must always review the process log to see what errors the process may have encountered.

Import From Enter the path to the directory where you downloaded the RECxxxxx.txt file from the NSI website.

File Name Enter the file name that contains the data to post.

NSI uses the following naming convention for change notifications: REC12345.txt, where RE means results, C means change notification and 12345 are 5 numbers to differentiate the files sent to schools. The extension .txt indicates that the file is a delimited text file.

This table lists the PeopleSoft records and fields that can be updated from a delimited NSI Change Notification file:

Record Name	***Field Name***
NAMES	FIRST_NAME
NAMES	MIDDLE_NAME
NAMES	LAST_NAME
PERSON	BIRTHDATE
PERS_DATA_EFFDT	SEX
PERSON	DT_OF_DEATH
SCC_PERSONL_NZL	SCC_STDNT_STAT_NSI
SCC_PERSONL_NZL	SCC_RESIDENTL_STAT

Record Name	Field Name
SCC_PERSONL_NZL	SCC_RES_ST_VERFCTN
SCC_PERSONL_NZL	SCC_NM_DOB_VERFCTN
SCC_PERSONL_NZL	SSR_NZQA_PAID
SCC_NSI_ADLCHG	SCC_PREF_NAME_IND
SCC_NSI_ADLCHG	SCC_MODIFIED_DATE
SCC_NSI_ADLCHG	SCC_CHGD_FIELD_IND
SCC_NSI_ADLCHG	SCC_PROVIDER_CODE

Reviewing Additional NSI Data

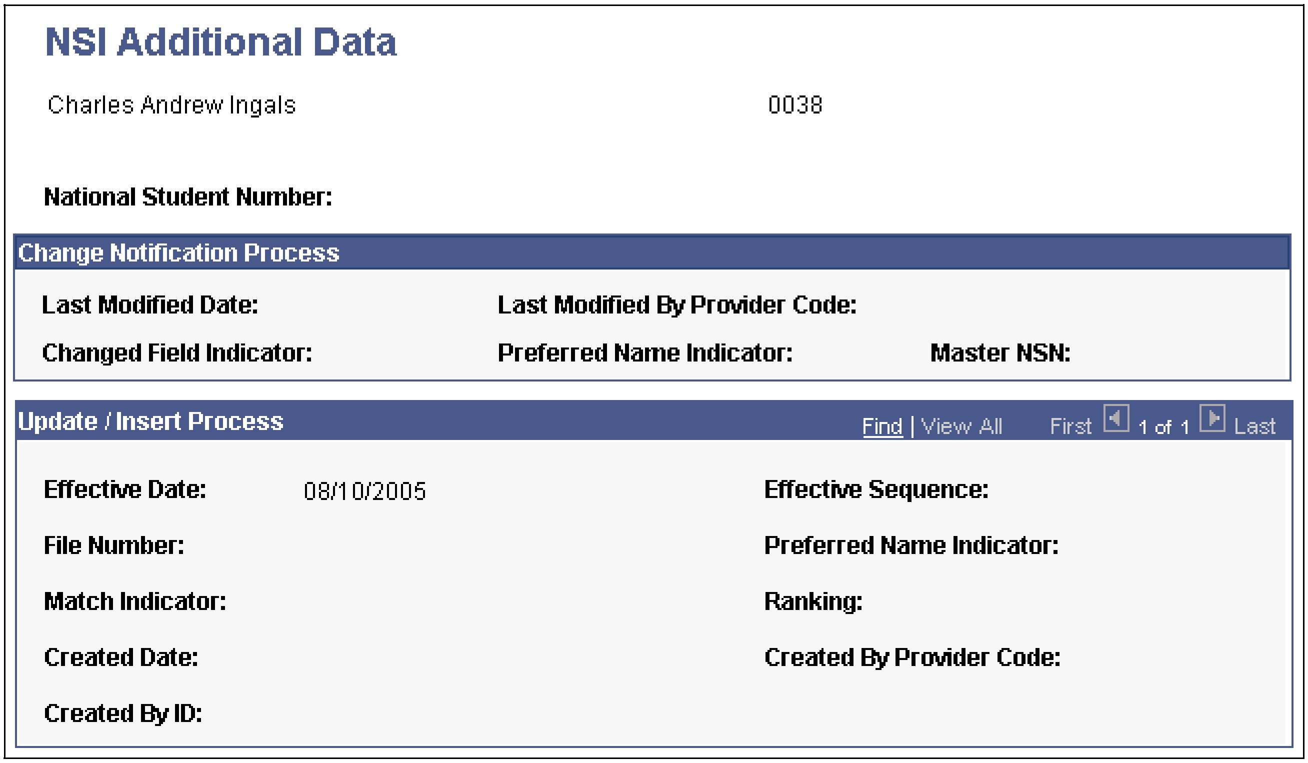
This section discusses how to review additional NSI data.

Page Used to Review Additional NSI Data

Page Name	Definition Name	Navigation	Usage
NSI Additional Data	SCC_ADDL_DATA_NSI	Campus Community, National Student Index NZL, NSI Additional Data	View additional data sent by NSI.

Reviewing Additional NSI Data

Access the NSI Additional Data page (Campus Community, National Student Index NZL, NSI Additional Data).



NSI Additional Data

Charles Andrew Ingals 0038

National Student Number:

Change Notification Process

Last Modified Date: Last Modified By Provider Code:

Changed Field Indicator: Preferred Name Indicator: Master NSN:

Update / Insert Process Find | View All First 1 of 1 Last

Effective Date: 08/10/2005 Effective Sequence:

File Number: Preferred Name Indicator:

Match Indicator: Ranking:

Created Date: Created By Provider Code:

Created By ID:

NSI Additional Data page

Additional data received from NSI appears on the NSI Additional Data page. Different data appears depending on whether the Post NSI Data process or the NSI Change Notification process was run.

Last Modified Date	Displays the date when another school (or provider) updated the NSI database for this individual. Because PeopleSoft does not maintain history of the changes made through the Change Notification process, the system displays only the last date on which a change was made.
Last Modified by Provider Code	Displays the name of the school (or provider) that made the changes.
Master NSN	Displays the main NSN for this individual. Because merges can be made in the NSI database, NSI always keeps track of the main NSN assigned to a student.
Changed Field Indicator	Indicates what data has been changed.

Chapter 39

Managing Health Information

This chapter provides an overview of managing health information, lists prerequisites and common elements, and discusses how to:

- Track audiometric exam data.
- Track eye exam data.
- Track physical exam data.
- Track respiratory exam data.
- Process accommodations.
- Identify regional impairment and support services.
- Track immunizations and health tests data.

Understanding Health Information

You can track health and medical exam data for every individual in your database. Use the pages described in this section to set up physicians and diagnosis codes, identify accommodation requests due to health and disability requirements, and enter various health exam and results for individuals.

Prerequisites

Before you can enter health data, you must set up health data codes and tables.

Note. If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing those integrations. Certain items and features that are detailed in this PeopleBook may vary depending on how you configure your systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

See Also

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Common Elements Used in This Chapter

Baseline
Select this check box to indicate that the current examination is the baseline examination for tracking the individual's physical condition over time.

Country
The country of the physician's address. When the Physician ID field is entered, and you select the country and exit the Country field, the system displays the physician's address (from the Physician Table - Address page) based on the specified country. If the individual does not have a physician ID in your system, enter his or her address here.

Date Received
Enter the date that you received or are entering the information about the test or event.

Date Taken
Enter the date that the individual took the test or immunization or completed the event.

Does Not Apply
Select this option to indicate that the test or event is not relevant for this individual.

Exam Date
The date on which the exam was administered. The default exam date is the system's current date. You can override this date.

Exam Type
Select the type of exam for this individual (for example, general health, annual, drug-screening, or fit for duty.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Expiration Date
Enter the date that the effectiveness of the test or immunization or event will expire.

Next Exam
The date on which this individual should be reevaluated. The system calculates and displays this date based on the examination type that you specify. You can override the calculated date.

The system calculates the dates based on these values:

Annual: One year later.

Exposure: Six weeks later.

Periodic Surveillance: Six months later.

Physician
The name of the physician or other specialist who administered the exam.

When you enter the physician ID, the system displays the individual's name. If the individual does not have a physician ID in your system, you must enter his or her name here (or go to the Physician Table - Name page, add the name, and return to this page).

Physician ID
Enter the ID of the physician or other medical professional (from the Physician Table - Name page) who administered the exam.

Referral

Select the place or people to which this individual is referred for further examination or treatment.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Test Not Taken

Select this option to indicate that the individual has not taken the test or has not completed the event.

Test Taken

Select this option to indicate that the individual has taken the test or has completed the event.

Tracking Audiometric Exam Data

You can enter and track basic information about hearing tests for individuals in your database, including exam dates and results, exam administrator, and reevaluation date.

This section discusses how to:

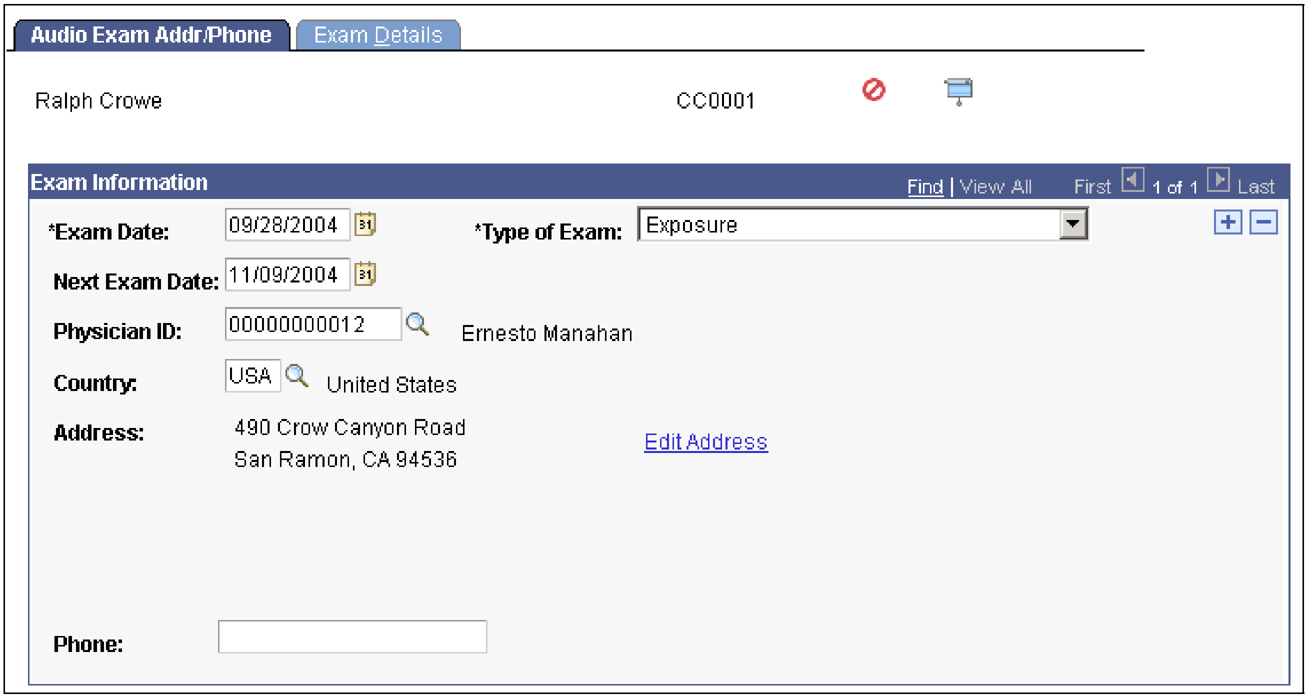
- Enter audiometric exam address and phone data.
- Enter audiometric exam details.

Pages Used to Track Audiometric Exam Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Audio Exam Addr/Phone (audiometric exam address/phone)	SCC_HS_EXAM_AUDIO1	Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Audiometric Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of audiometric exam administered.
Exam Details (Audiometric)	SCC_HS_EXAM_AUDIO2	Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Exam Details	Enter audiometric exam details, including results, referrals, and comments.

Entering Audiometric Exam Address and Phone Data

Access the Audio Exam Addr/Phone page (Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Audiometric Exam Addr/Phone).

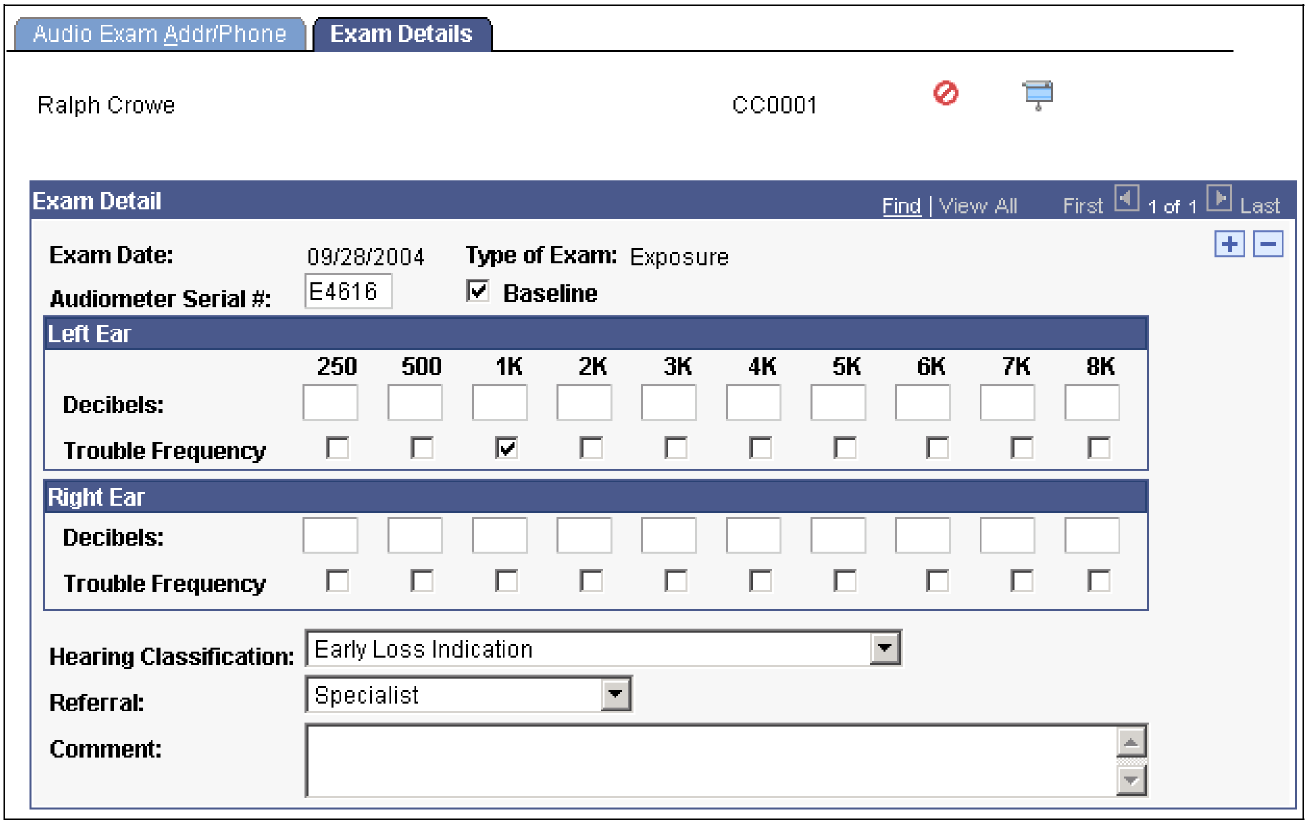


Audio Exam Addr/Phone (audiometric exam address/phone) page

Enter information to describe the exam.

Entering Audiometric Exam Details

Access the Exam Details (Audiometric) page (Campus Community, Personal Information, Health Information, Health Exams, Audiometric Exam, Exam Details).



Exam Details page for audiometric exams

Audiometer Serial #

The serial number of the audiometer that is used to administer this exam.

Decibels

For each ear, enter the decibel level at which the individual hears the specified frequency.

Trouble Frequency

Select to indicate that the individual did not hear this frequency within the appropriate decibel range.

Hearing Classification

Select the classification that describes the results of this exam. Values are *Abnormal, Shift, Early Loss Indication,* and *Normal.*

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment

Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Tracking Eye Exam Data

You can enter and track basic information about visual acuity exams, including exam date, exam administrator, and whether the individual needs corrective lenses.

This section discusses how to:

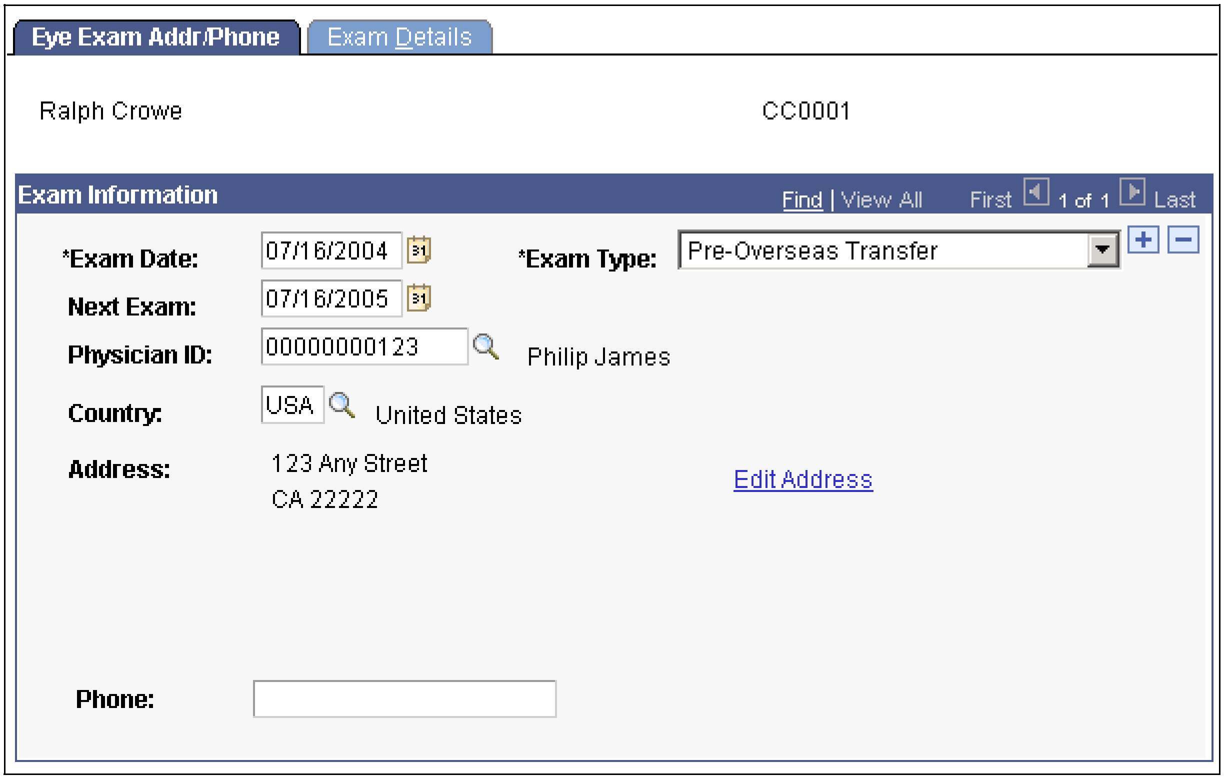
- Enter the eye examiner's address and phone data.
- Enter eye exam details.

Pages Used to Track Eye Exam Data

Page Name	Definition Name	Navigation	Usage
Eye Exam Addr/Phone (eye exam address/phone)	SCC_HS_EXAM_EYE1	Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Eye Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of eye exam administered.
Exam Details	SCC_HS_EXAM_EYE2	Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Exam Details	Enter eye exam details, including results, referrals, and comments.

Entering the Eye Examiner's Address and Phone Data

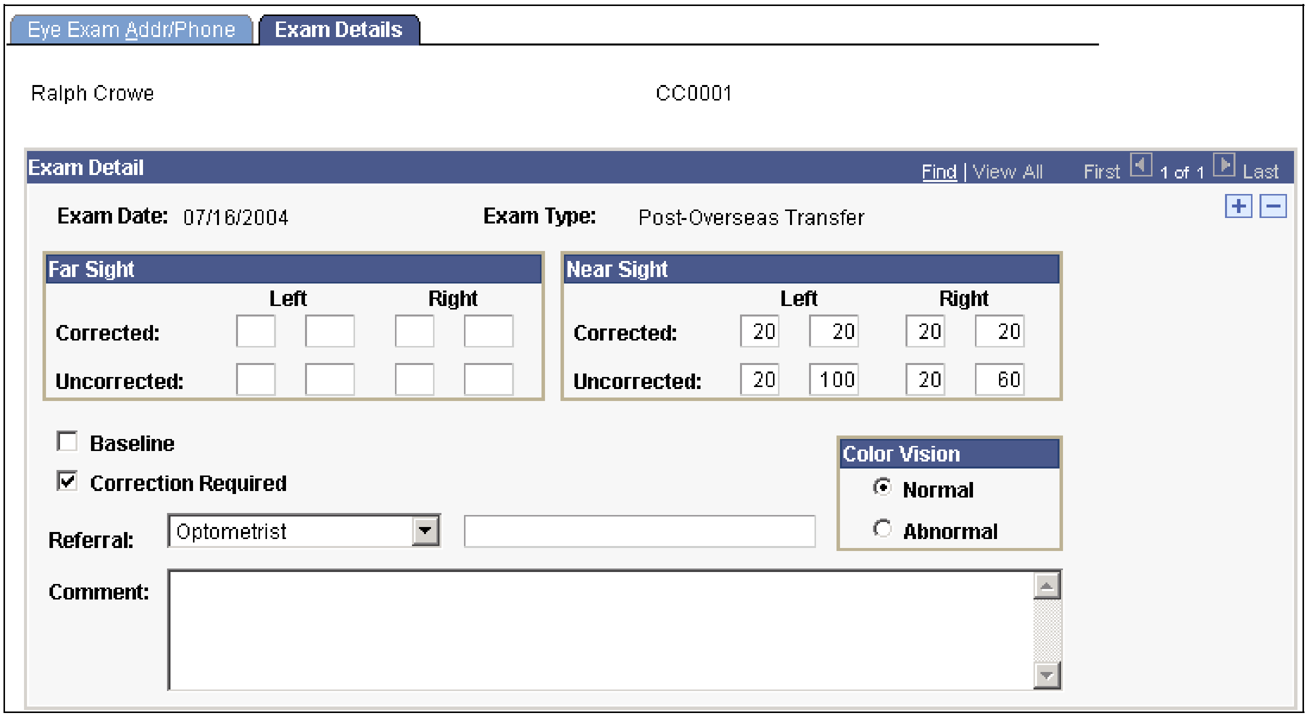
Access the Eye Exam Addr/Phone page (Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Eye Exam Addr/Phone).



Eye Exam Addr/Phone page

Entering Eye Exam Details

Access the Exam Details page for eye exams (Campus Community, Personal Information, Health Information, Health Exams, Eye Exam, Exam Details).



Exam Details page for eye exams

Far Sight or Near Sight

Corrected and **Uncorrected** For each eye, enter the visual acuity with and without corrective lenses.

Correction Required Select to indicate that this individual needs lenses or other corrective treatment.

Color Vision

Normal or **Abnormal** Select one of these options to indicate whether the individual's color perception is normal or abnormal.

Tracking Physical Exam Data

You can enter and track basic information physical examinations for individuals in your database, including exam dates and types and who administered the exam. You can also enter an individual's donor information, blood type, referrals, and other comments.

This section discusses how to:

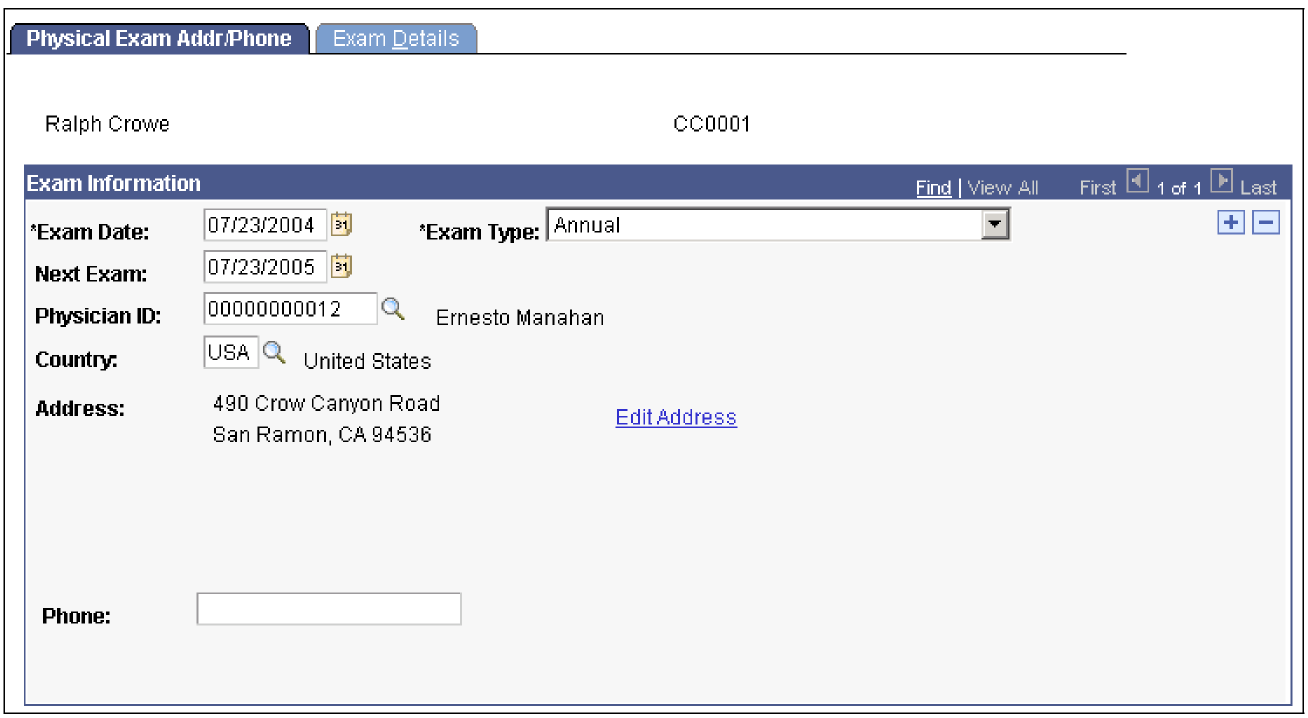
- Enter the physician's exam address and phone data.
- Enter physical exam details.

Pages Used to Track Physical Exam Data

Page Name	Definition Name	Navigation	Usage
Physical Exam Addr/Phone (physical exam address/phone)	SCC_HS_EXAM_PHYS1	Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Physical Exam Addr/Phone	Enter the examiner's address and phone data and the date and type of the physical exam.
Exam Details	SCC_HS_EXAM_PHYS2	Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Exam Details	Enter details about the exam, including results, donor information, blood type, referrals, and comments.

Entering the Physician's Exam Address and Phone Data

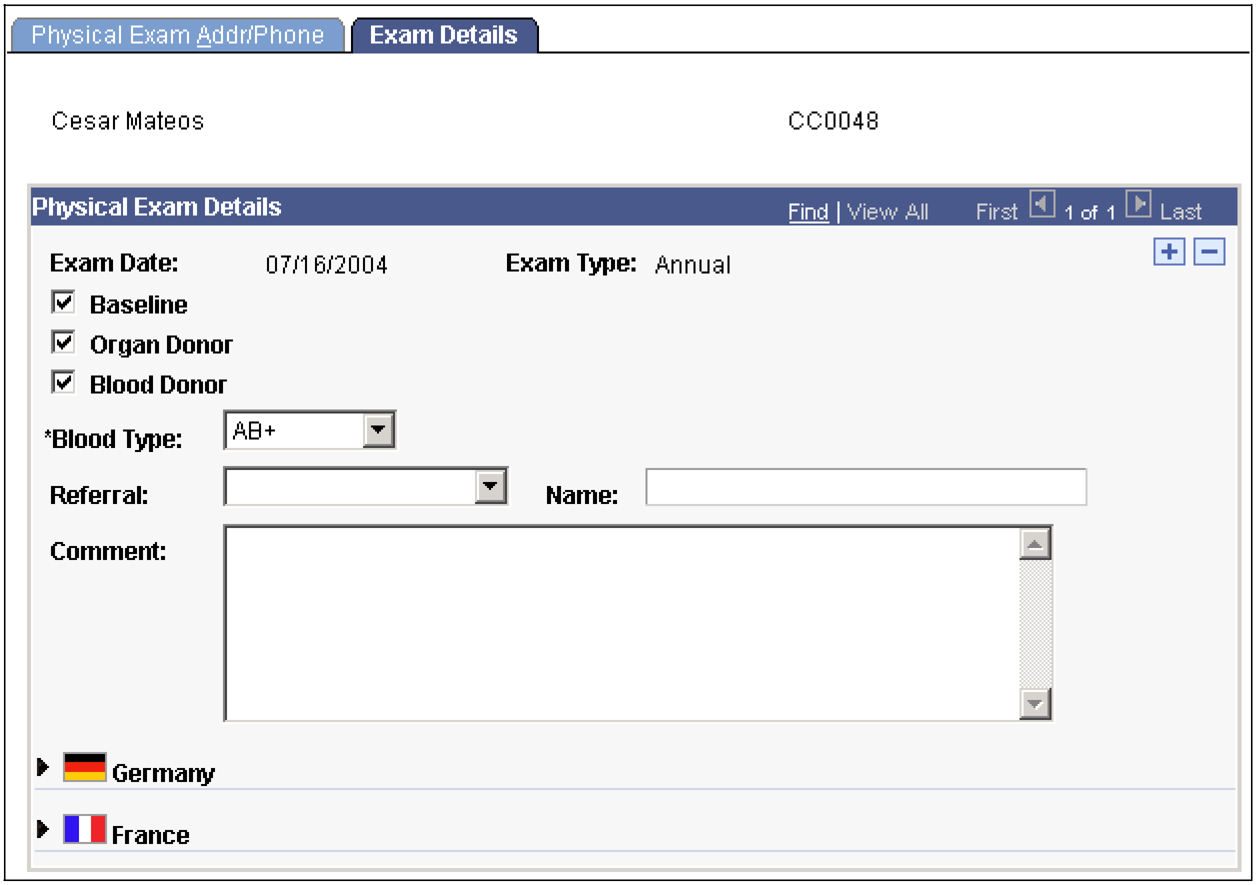
Access the Physical Exam Addr/Phone page (Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Physical Exam Addr/Phone).



Physical Exam Addr/Phone page

Entering Physical Exam Details

Access the Exam Details page for physical exams (Campus Community, Personal Information, Health Information, Health Exams, Physical Exam, Exam Details).



Exam Details page for physical exams

Organ Donor and **Blood Donor**

Select to indicate whether this individual is or wants to be an organ donor or a blood donor.

Blood Type

Enter this individual's blood type.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Referral and **Name**

Enter the type of professional and name of the person to contact at the place of referral.

Comment

Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Note. For information about physical exam details for (GBR) Germany and (FRA) France, refer to your PeopleSoft HRMS documentation.

See Also

PeopleSoft HRMS 9.0 PeopleBook: Monitor Health and Safety,"Setting Up Incident, Injury, and Illness Tracking"

Tracking Respiratory Exam Data

You can enter and track basic information about respiratory examinations for individuals in your database, including exam dates, types, and results; who administered the exam and when the individual should be reevaluated.

This section discusses how to:

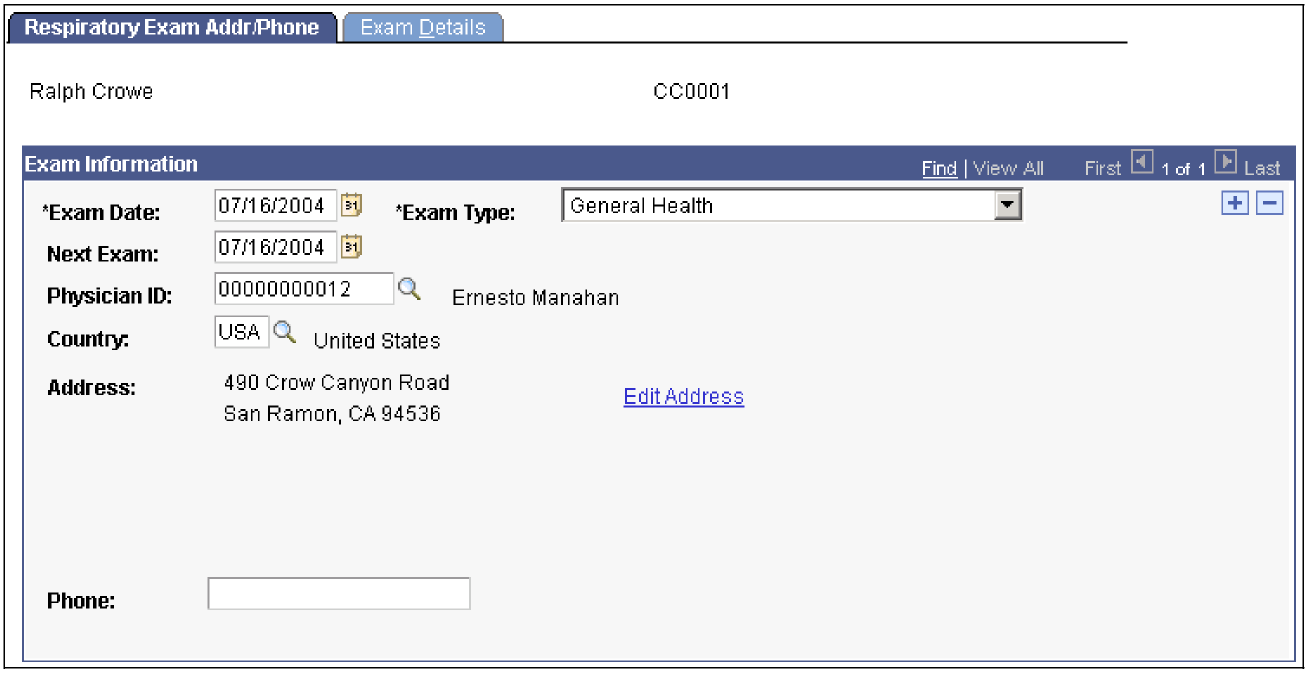
- Enter the respiratory examiner's address and phone data.
- Enter respiratory exam details.

Pages Used to Track Respiratory Exam Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Respiratory Exam Addr/Phone (respiratory exam address/phone)	SCC_HS_EXAM_RESP1	Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Respiratory Exam Addr/Phone	Enter the examiner's address and phone data, and the date and type of respiratory exam.
Exam Details	SCC_HS_EXAM_RESP2	Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Exam Details	Enter the respiratory exam details, including results, referrals, and comments.

Entering the Respiratory Examiner's Address and Phone Data

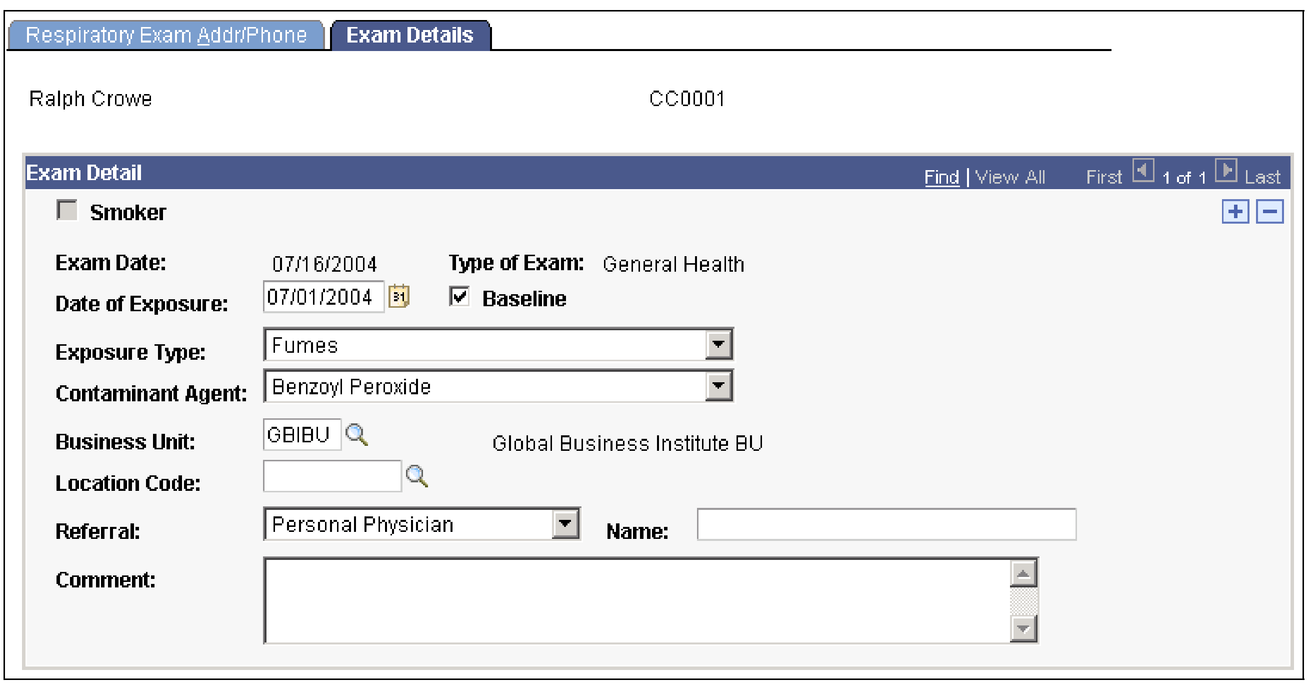
Access the Respiratory Exam Addr/Phone page (Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Respiratory Exam Addr/Phone).



Respiratory Exam Addr/Phone page

Entering Respiratory Exam Details

Access the Exam Details page for respiratory exams (Campus Community, Personal Information, Heath Information, Health Exams, Respiratory Exam, Exam Details).



Exam Details page for respiratory exams

Note. Some fields that appear on PeopleSoft Campus Solutions pages are related to PeopleSoft HRMS only. For example, the Smoker check box on this page is an HRMS-only option.

Date of Exposure

The date when this individual was exposed to the contaminant, causing the need for this exam.

Exposure Type

Enter the type of exposure that the individual endured (for example, biohazard, chemicals, or dust).

Values for this field are delivered with your system as translate values. You can modify these translate values.

Contaminant Agent

Enter the specific contaminant to which the individual was exposed (for example, asbestos, lead, or Mercury.

Business Unit

Select the business unit or department that was responsible at the time of the exposure or contamination

Location Code

Select the location where the contamination took place.

Name

Enter the name of the person to contact at the place of referral.

Comment

Enter comments to further identify or describe the results of this individual's exam or the specialist to whom the individual is referred.

Processing Accommodations

Use accommodation codes to track the types of accommodations that your institution is requested or required to make and to track the changes that your institution approves and who is responsible for making them. You can enter data to track the requests for special accommodations and enter diagnosis codes for the disabilities that require the accommodation request. You can also enter various options that your institution might have in response to a request.

Note. Several fields on the Accommodations pages, including Job Code, Job Location, Job Code Tasks, and Regulatory Region, are defined on pages from the HRMS menus. If your institution uses PeopleSoft HRMS, see your HRMS documentation to determine how to define and use those items in there. Use these fields as needed in Campus Solutions.

This section lists prerequisites and discusses how to:

- Enter accommodation requests.
- Enter accommodation options.
- Enter accommodation job tasks.

Prerequisites

Before entering and tracking accommodation data, you must:

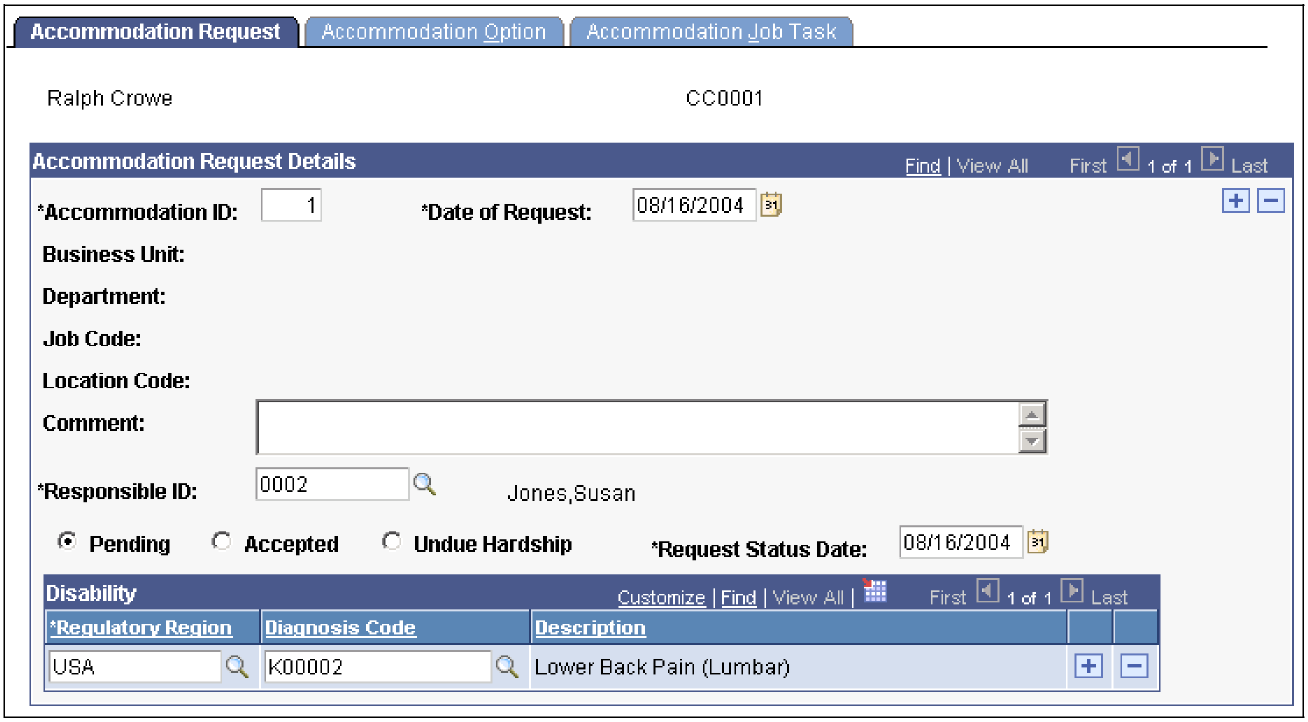
- Set up codes for types of accommodations.
- Define diagnosis codes to help identify reasons for the accommodation.
- Define regulatory regions.
- Set up business units, job codes, job locations, and job code tasks.

Pages Used to Process Accommodations

Page Name	***Definition Name***	***Navigation***	***Usage***
Accommodation Request	SCC_ACCOMM_REQUEST	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Request	Enter and track an individual's accommodation request.
Accommodation Option	SCC_ACCOMM_OPTION	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Option	Enter and track options for an accommodations request.
Accommodation Job Task	SCC_ACCOMM_JOB_TSK	Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Job Task	Enter and track the employee location and job task that is accommodated by honoring the request.

Entering Accommodation Requests

Access the Accommodation Request page (Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Request).



Accommodation Request page

Accommodation Request Details

Accommodation ID

The number of this request on the list of this individual's accommodation requests.

The system displays the next sequential number for each accommodation request that you add. You can override the number to reorder the list of accommodation requests.

Date of Request

The date of this accommodation request. The default date is the system's current date, which you can override.

Comment

Enter comments that further identify the accommodation request for this individual.

Responsible ID

Enter the ID of the individual at your institution who is managing this request.

Pending, Accepted, or **Undue Hardship**

Select one of these options to indicate whether the request is pending, evaluated and accepted, or evaluated and denied due to an undue hardship on the department or institution.

Request Status Date

Enter the date that the request was changed to a status of pending, accepted, or denied.

Disability

Regulatory Region — Enter the code for the country whose regulations apply to this request.

Diagnosis Code — Enter the diagnosis code (from the Diagnosis Table page) that describes the illness or disability for which accommodations have been requested.

Description — Displays the description that is associated with the diagnosis code that you entered.

Entering Accommodation Options

Access the Accommodation Option page (Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Option).

Accommodation Option page

Accommodations/Alternatives

Option ID — The system displays the number of this option request in the list of options for this accommodation request.

The system displays the next sequential number for each option that you add. You can override the number to reorder the list of options.

Employer Suggested Option
Select this check box to indicate that a staff person at your institution suggested this option.

Currency Code
Enter the currency in which the cost is expressed.

Type
Enter the type of accommodation (from the Accommodation Type Table page) that is recommended as part of this option.

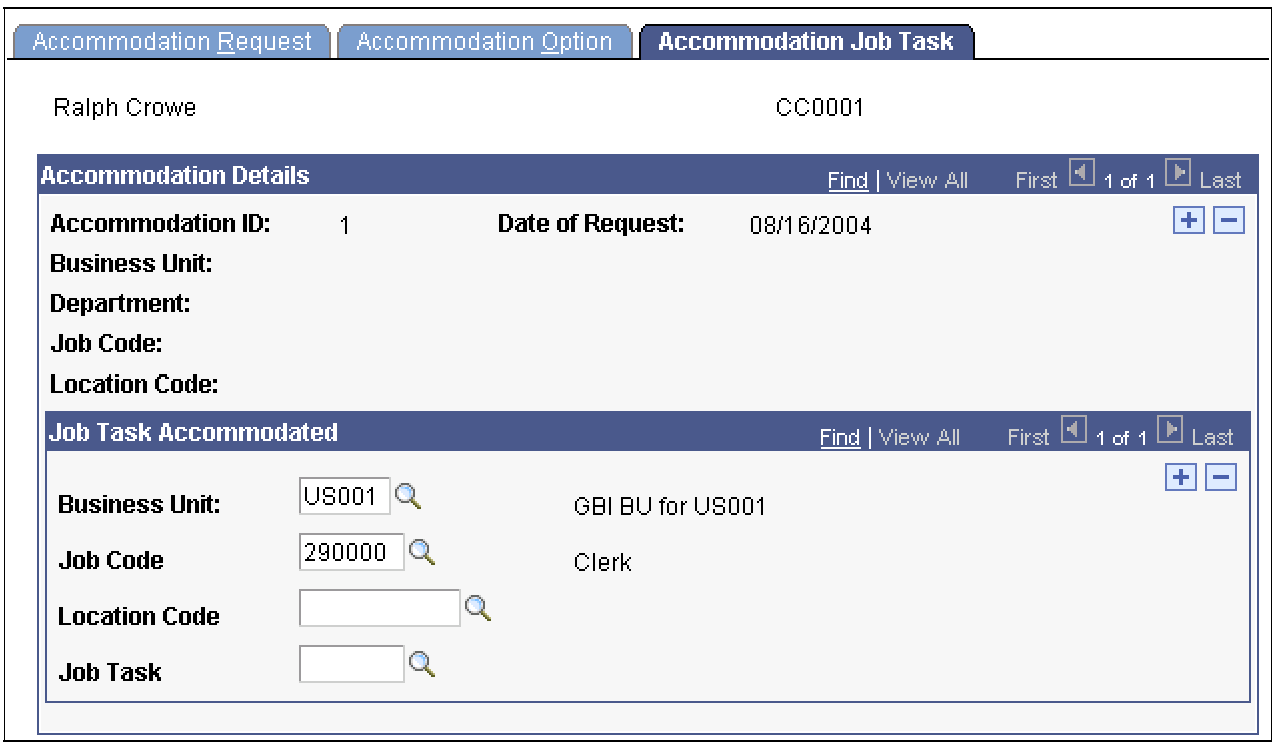
Cost
Enter the cost of this type of accommodation.

Description
Enter comments to further describe or identify the item or service suggested in this option.

Accommodation Status and **Status Date**
Enter the status of this option (such as accepted, approved, consider, offered, or rejected), and the date of the status.

Entering Accommodation Job Tasks

Access the Accommodation Job Task page (Campus Community, Personal Information, Health Information, Accommodation Data, Accommodation Job Task).



Accommodation Job Task page

Use fields on this page to process employees.

See Also

PeopleSoft HRMS 9.0 PeopleBook: Administer Workforce,"Entering Additional Data in Human Resources Records,"Tracking Disabilities

Identifying Regional Impairment and Support Services

Identify an individual's disability and indicate if support services are requested.

Page Used to Identify Regional Impairment and Support Services

Page Name	***Definition Name***	***Navigation***	***Usage***
Impairment Regional	SCC_IMPAIR_DTL	Campus Community, Personal Information, Health Information, Impairment Regional, Impairment Regional Campus Community, Personal Information (Student), Health Information (Student), Impairment Regional, Impairment Regional	Identify an individual's disability and indicate if support services are requested.

Entering Impairment Data

Access the Impairment Regional page (Campus Community, Personal Information (Student), Health Information (Student), Impairment Regional, Impairment Regional).

Impairment Regional page

Use this page to indicate information about an individual's disability, particularly about whether or not support services have been requested.

(NZL) Disability Services NZL

Indicate whether a student has accessed disability services and the year in which the services were accessed.

This group box is available only when the NSI and SDR Personal Data, SDR Degree check box is selected on the SA Features page (Student Admin Installation).

Tracking Immunizations and Health Tests Data

Use codes in your system to enter and track an individual's immunization and general health test data.

This section lists prerequisites and common elements and discusses how to:

- Enter immunization data.
- Enter health test data.

Prerequisites

Before you enter and track immunization and health data, define immunization codes, health test codes, and diagnosis codes.

Common Elements Used in This Section

Comments Enter comments to further identify or describe the immunization or health test.

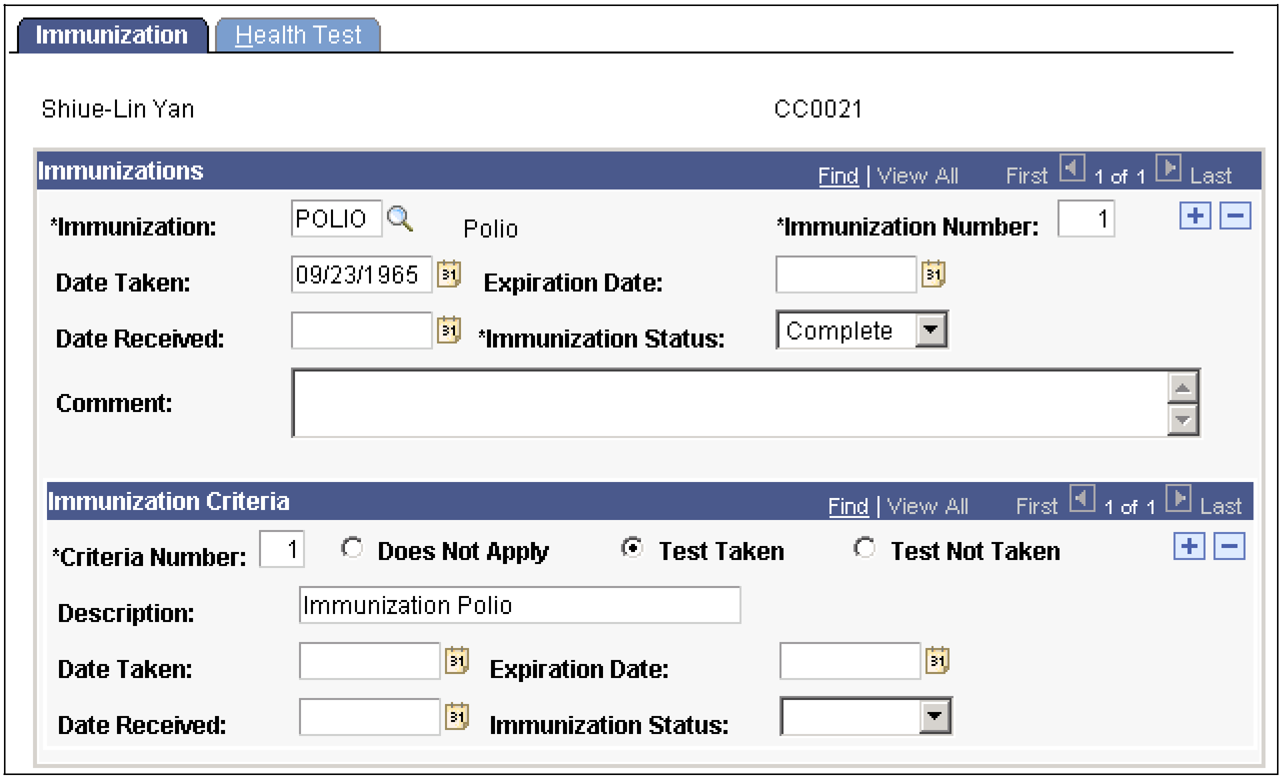
Criteria Number The criteria number for the immunization or health test.

Pages Used to Track Immunization and Health Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Immunization	IMMUNIZATION	Campus Community, Personal Information, Health Information, Immunizations and Health, Immunization	Enter immunization data for an individual.
Health Test	HEALTH_TEST	Campus Community, Personal Information, Health Information, Immunizations and Health, Health Test	Enter or review data from an individual's health test.

Entering Immunization Data

Access the Immunization page (Campus Community, Personal Information, Health Information, Immunizations and Health, Immunization).



Immunization page

Immunizations

Immunization

Enter the immunization, from the Immunization Table page, that this individual has received.

Immunization Number

The number of this immunization on the list of immunizations for this individual.

The system displays the next sequential number for each immunization that you add. You can override the number to reorder the list of immunizations.

Immunization Status

Select the status of this immunization, such as complete, not on file, or partial.

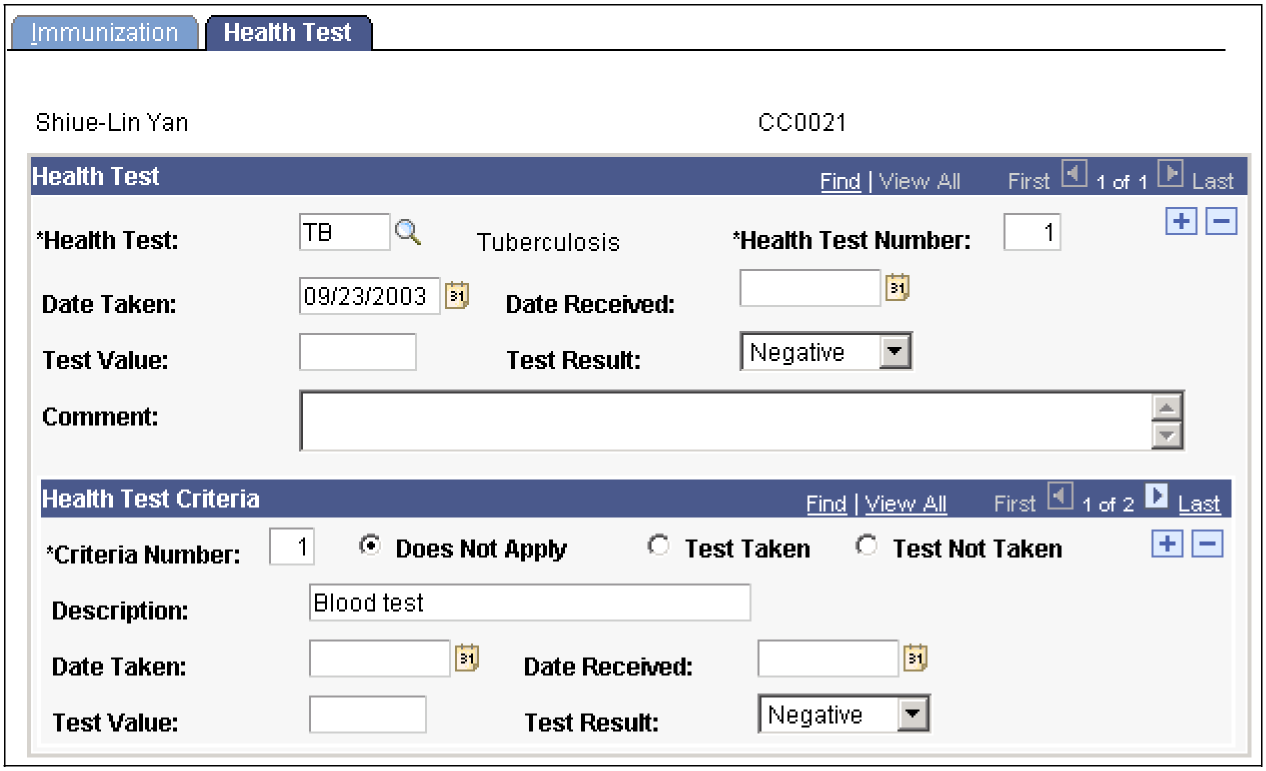
Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Immunization Criteria

When criteria are associated with this immunization on the Immunization Table page, the system displays the criteria data in this group box.

Entering Health Test Data

Access the Health Test page (Campus Community, Personal Information, Health Information, Immunizations and Health, Health Test).



Health Test page

Health Test

Health Test Select the health test, from the Health Test Table page, that this individual has taken.

Health Test Number The number of this health test on the list of health tests for this individual.

The system displays the next sequential number for each health test that you add. You can override the number to reorder the list of health tests.

Test Value Enter the test result value, in alphabetic, numeric, percentage, or other form, as expressed by the medical community (for example, AB or O for blood type; or 177 for cholesterol).

Test Result

Select the overall test result. Values are:

Negative

Neutral

Positive

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Health Test Criteria

When criteria are associated with this health test on the Health Test Table page, the system displays the criteria data in this group box.

Chapter 40

Managing Personal Identification Data

This chapter provides an overview of personal identification data and discusses how to:

- Enter citizenship data.
- Enter driver's license data.
- Enter residency data.
- Enter photographs.
- Enter personal identification numbers (PINs).

Understanding Personal Identification Data

You can scan photos and enter driver's license data in your database to help you identify and recognize individuals at your institution.

Your institution might require an individual's driver's license number and the state from which the license was issued. Your institution might also want to know if the driver's license is valid and how many violations and points are on driver's record. Driver's license and driver's record information might be considered when issuing parking permits, granting the use of departmental vehicles, or maintaining carpools.

You can upload photos to your database to help identify individuals. Use your institution's image importing method to place the image in a file on your computer and save it in *JPEG* format. Then, using the Photo page, you can upload that image to the individual's record in your database.

You can track the official and self-reported residency of individuals at your institution. You can also enter data for residency appeals.

You can also enter and track IDs from external systems and correlate them to individuals or organizations in PeopleSoft Campus Solutions. For example, if your institution uses a separate housing database, you could identify the individual's housing ID.

Use the Personal Identification Number page to assign PINs to individuals as required at your institution. For example, if your institution uses a separate housing database and individuals need a PIN to access their own housing information, you can assign that here.

Using the Citizenship pages, you can enter multiple countries of citizenship and multiple passports for individuals, and track their visa and permits data.

Note. (USA) Use PeopleSoft Patriot Act SEVIS Solutions (PASS) visa processing functionality to track foreign students and exchange visitors and their dependents as required by the U.S. Department of Homeland Security (DHS).

Entering Citizenship Data

This section provides overviews of citizenship and passport data and visa and permit data, and discusses how to:

- Enter citizenship and passport data.
- Enter visa and permit data.

Understanding Citizenship and Passport Data

An important component of the data that you must track for students or employees who travel internationally to or from your institution is passport and citizenship information. Using the Citizenship/Passport Data pages, you can enter multiple countries of citizenship and multiple passports for individuals.

Using the country codes and citizen status codes in your system, you can identify an individual's country of citizenship, the current status of that citizenship, when citizenship was issued, and when citizenship expires.

Understanding Visa and Permit Data

If your institution admits foreign students or hires individuals who are not citizens of the country where your institution is located, you should set up codes that classify the types of visas and permits required by the appropriate governments.

Using the Supporting Document Table page, you can set up document codes to identify birth certificates, letters of employment, immigration application letters, and other documents required to obtain I-9 verification for individuals attending your institution.

Note. If you license and use PeopleSoft HRMS, many supporting document IDs and visa and permit types might already exist in your system.

Each country has its own regulations for permitting foreign employees to work, visit, or reside there. To track information about the visas and permits required for individuals to work at, visit, or attend your institution, use the Visa/Permit Data page.

You can also use your system to prepare visa forms. You can enter data for DS-2019 forms for international applicants, students, professors, and visitors who need a J1 Visa. You can also prepare and print I-20 forms for international students who are admitted to or currently enrolled in your institution and who need an F1 Student Visa.

Prerequisites

Before entering citizenship data for an individual, you must define levels of citizenship status for each country and visa and permit types.

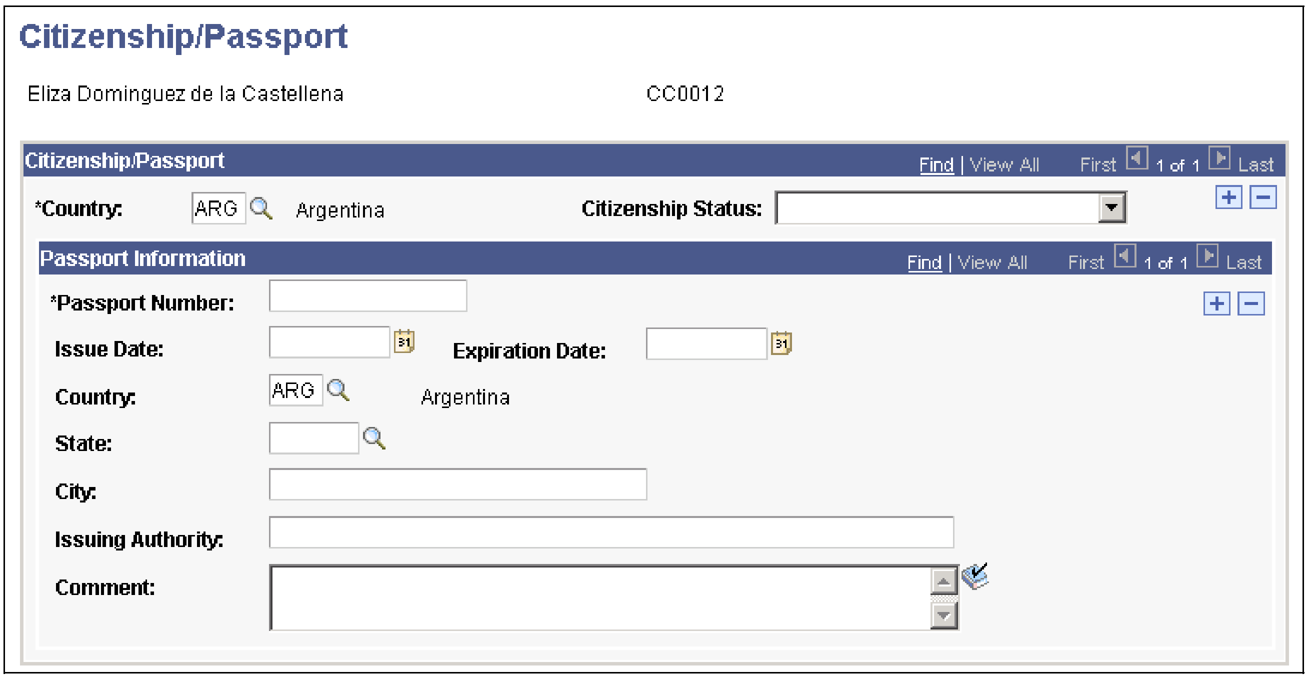
Pages Used to Enter Citizenship Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Citizenship/Passport	LS_CITIZEN_PASSPRT	Campus Community, Personal Information, Identification, Citizenship, Citizenship and Passport	Enter citizenship and passport data for an individual.
Visa/Permit Data	SCC_VISA_PERMIT	• Campus Community, Personal Information, Identification, Citizenship, Visa Permit Data • Click the Visa/Permit link on the Biographical Details page.	Enter and track an individual's visa and permit information.
Port of Entry	SEV_POE_DATA	Campus Community, Personal Information, Identification, Citizenship, Visa Permit Data, Port of Entry Data	Enter information to identify the individual's entry point into the area.
DS-2019	DS2019_FORM1 DS2019_FORM2 DS2019_FORM3 DS2019_FORM4 DS2019_FORM5 DS2019_FORM6 DS2019_FORM7	Campus Community, SEVIS, DS-2019 Forms, DS-2019 Form	Enter data for preparing DS-2019 forms for an international applicant, student, professor, or visitor who needs a J1 visa.
I-20	I20_FORM1 I20_FORM2 I20_FORM3 I20_FORM4 I20_FORM5 I20_FORM6 I20_FORM7	Campus Community, SEVIS, I-20 Forms, I-20 Form	Enter data for preparing I-20 forms for an international student who is admitted to or currently enrolled in your institution and who needs an F1 visa.
Citizenship / Country / Visa	PRCSRUNCNTL	Campus Community, Personal Information, Identification, Citizenship, Citizenship Country Visa Audit	Generate the Citizenship Status and Country report (PER033) to audit citizenship status.

Page Name	Definition Name	Navigation	Usage
Passport / Visa Expiration	PRCSRUNCNTL	Campus Community, Personal Information, Identification, Citizenship, Passport Visa Expiration Rpt, Passport / Visa Expiration	Generate the Passport/Visa Expiration report (PER032) to audit passport and visa status.

Entering Citizenship and Passport Data

Access the Citizenship/Passport page (Campus Community, Personal Information, Identification, Citizenship, Citizenship and Passport).



Citizenship/Passport page

Citizenship/Passport

Country Specify the country of the individual's citizenship.

Citizenship Status Specify the status (for example, native, naturalized, or alien permanent) of this individual's citizenship in the specified country. These status values are from the Citizen Status Table page.

Passport Information

Passport Number Enter the number from the individual's official passport.

Issue Date Enter the official issuance date that is stamped on the passport.

Expiration Date Enter the official expiration date that is stamped on the passport.

Country Specify the country where the passport was issued.

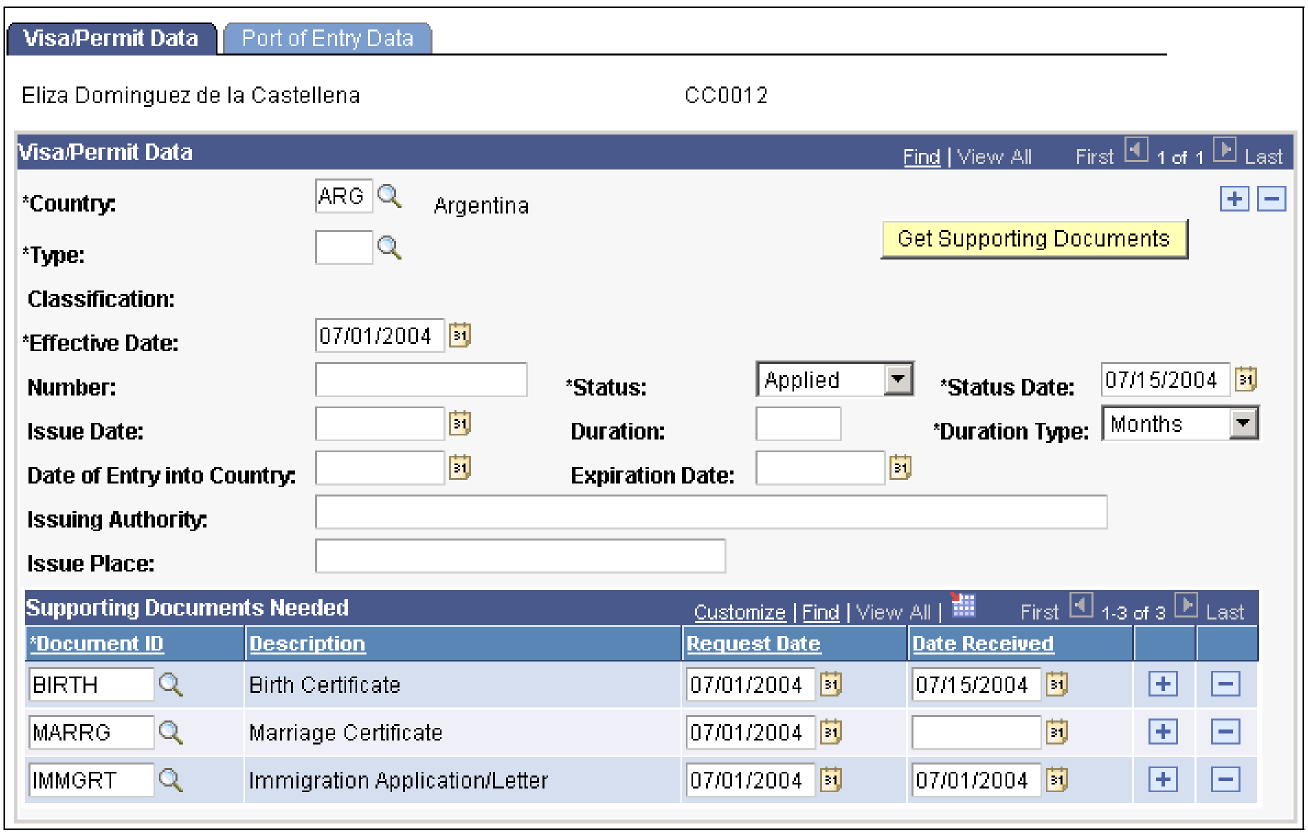
Additional location fields appear based on the country that you select, so that you can provide additional location details, such as city and state or province.

Authority Enter the name of the agency or authority that issued the passport.

Comment Enter comments to further describe the individual's citizenship, passport, or nature of the issuance of the passport.

Entering Visa and Permit Data

Access the Visa/Permit Data page (Campus Community, Personal Information, Identification, Citizenship, Visa Permit Data).



Visa/Permit Data page

Note. This is the page to which you are transferred when you click Visa/Permit Data on the Biographical Details page.

Visa/Permit Data

Country	Specify the issuing country for the individual's visa or permit.
Type	Select the type of visa or permit, from the Visa/Permit Table page. The available types are based on the country specified.
Classification	Displays the classification based on the type of visa or permit selected.
Effective Date	Enter the date on which the visa or permit is effective or the date on which the information should become effective in your database.
Number	Enter the issuance number from the individual's official visa or permit.
Status	The status of the official visa or permit (for example *Applied,Granted, Renewal,* or *Renewed.* Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Status Date	Enter the date of the status. The default status date is the system's current date. You can override this date.
Duration	Specify the length of time during which the visa or permit is valid. Enter the number in the first field, and in the second field specify the period, such as days, months, terms, or years. Values for the second field are delivered with your system as translate values. You can modify these translate values.
Issue Date	Enter the date of issuance from the individual's official visa or permit.
Date of Entry into Country	Enter the official date on which the individual entered your institution's country.
Expiration Date	Enter the date on which this individual's visa or permit expires. The system calculates the expiration date based on the specified duration and the date of entry into the country. You can override the system-calculated date.
Issuing Authority	Enter the name of the agency or authority that issued the official visa or permit.
Issue Place	Enter the name of the location where the official visa or permit was issued.

Supporting Documents Needed

Supporting Document ID	Select the supporting documents that are required for this type of visa or permit.

Get Supporting Documents Click this button to retrieve the supporting document IDs and descriptions from the Visa/Permit Table page for this visa or permit type.

Request Date Enter the date on which your institution requests the supporting document.

Date Received Enter the date on which your institution receives the supporting document.

Entering Driver's License Data

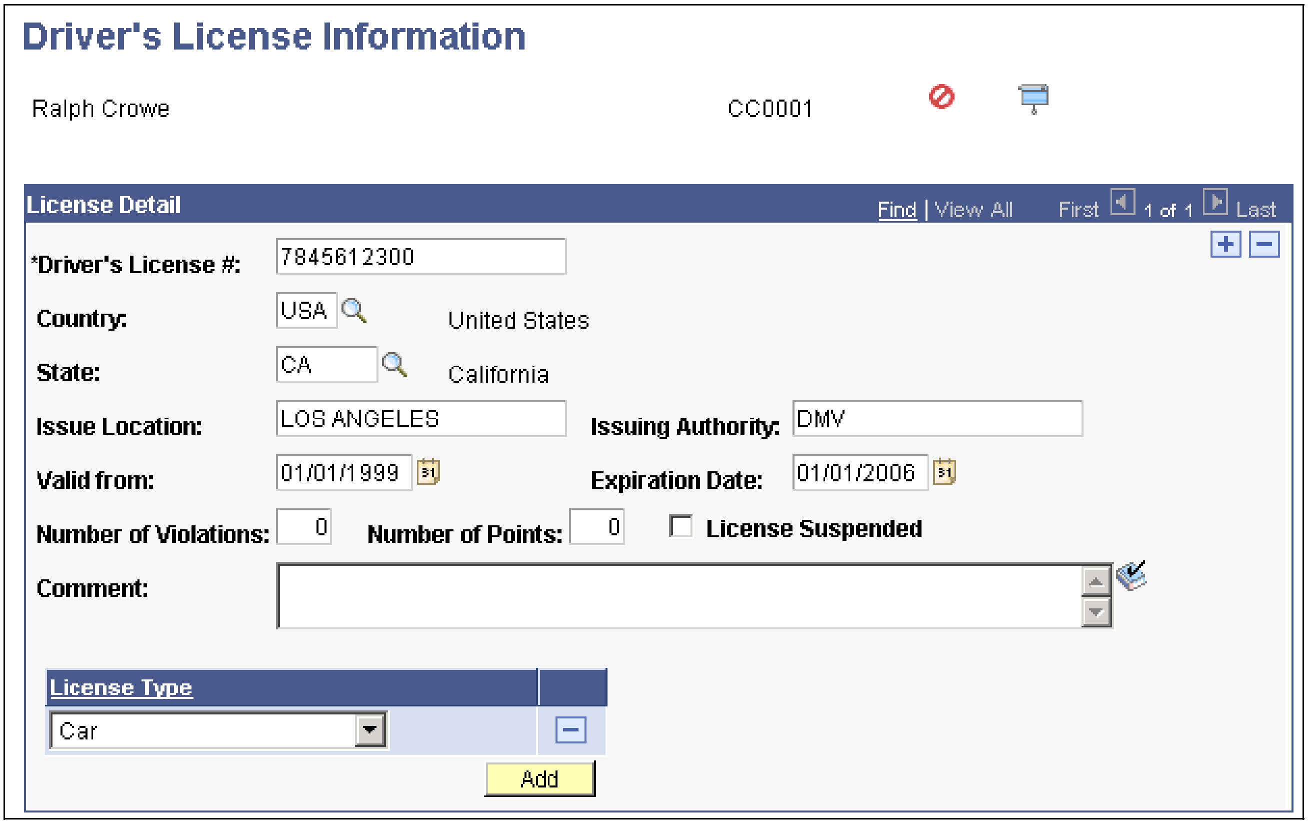
This section discusses how to enter driver's license data.

Page Used to Enter Driver's License Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Driver's License Information	DRIVERS_LIC_SA	Campus Community, Personal Information, Identification, Driver's License Data	Enter license numbers and driving record information.

Entering Driver's License Data

Access the Driver's License Information page (Campus Community, Personal Information, Identification, Driver's License Data).



Driver's License Information page

License Detail

Driver's License # (driver's license number) — The number from the individual's driver's license.

Country — The country in which the license was issued.

State — The state in which the license was issued.

Issue Location — The location where the license was issued. For example, this can be the street address, the city, the county, or whatever your institution decides.

Issuing Authority — The authority or agency that issued the license. For example, this can be the name of the motor vehicle agency.

Valid from — The date that the license became effective, which is usually the issuing date.

Expiration Date — The date that the license expires.

Valid from/to — The dates for which the license is valid, which is usually the issuing date and the expiration date.

Number of Violations — The number of traffic violations on record for this individual.

Number of Points	The number of points on record for this individual.
License Suspended	Select this check box to indicate that this individual's driver's license is currently suspended.
Comment	Enter information to further identify or describe this individual's driver's license or driver's record.
License Type	The type of driver's license, such as car, chauffeur, class C, motorcycle, or truck, that is issued to this individual under the specified license number. Add a new license if the license number is different. Values for this field are delivered with your system as translate values. You can modify these translate values.

Entering Residency Data

This section provides an overview of residency data and discusses how to:

- Enter official residency data.
- Entering official residency location details.
- Enter self-reported residency data.
- Enter residency appeal data.

Understanding Residency Data

Using the Resident Table page, set up codes to represent the residency rules of your institution. For example, your institution might require residency codes for residency that is in state, out of state, in district, out of district, and so on. On the Residency Exception Table page, set up exceptions to the residency rules. For example, some individuals might be exempt from nonresidency requirements because they are in the military. Exceptions are especially useful in tuition calculation.

After you set up residency codes and residency exception codes, use the Official Residency 1 and 2 pages to record residency information that your institution has verified, including the individual's state residency or out-of-state residency for a specific term. You can enter unofficial, self-reported residency information on the Residency Self-Report page.

When an individual appeals residency information, you can enter the information on the Residency Appeal page, including the date and status of the appeal and comments about the appeal.

Prerequisites

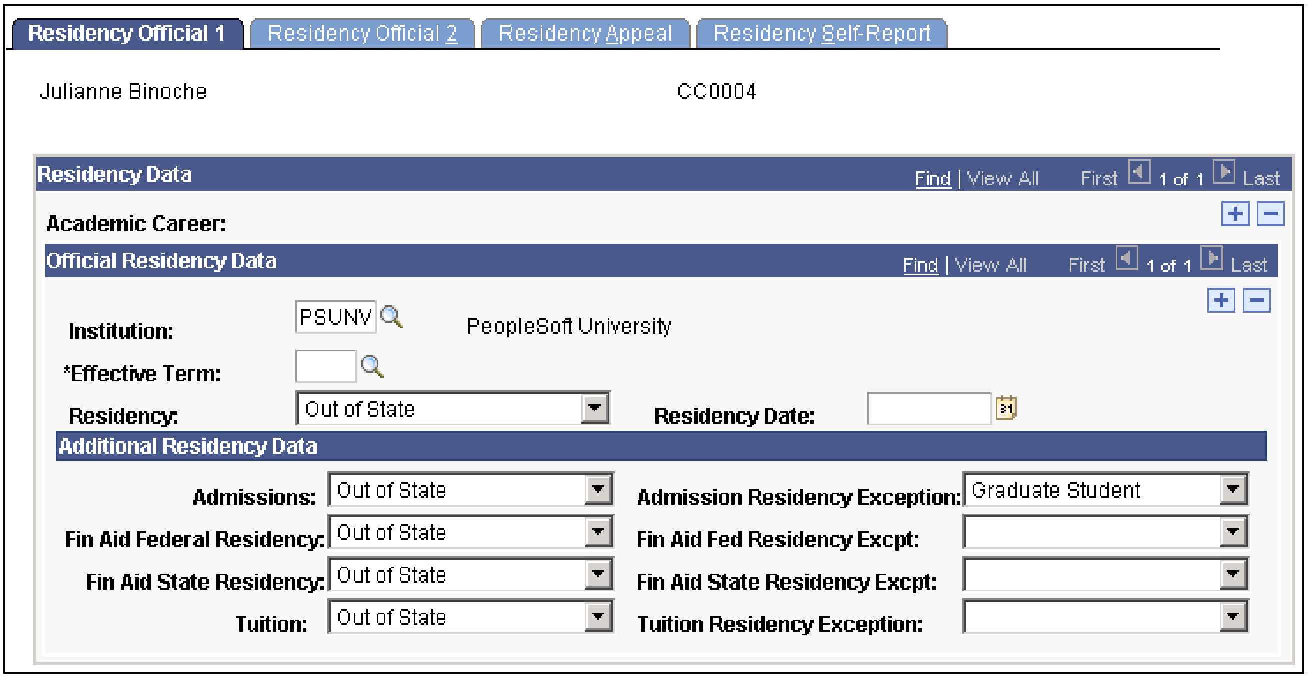
Before entering residency data, define residency rules.

Pages Used to Enter Residency Data

Page Name	Definition Name	Navigation	Usage
Residency Official 1	RESID_OFFICIAL1	Campus Community, Personal Information, Identification, Residency Data, Residency Official 1	Enter official residency data for an individual.
Residency Official 2	RESID_OFFICIAL2	Campus Community, Personal Information, Identification, Residency Data, Residency Official 2	Enter additional official residency data for an individual.
Residency Appeal	RESIDENCY_APPEAL	Campus Community, Personal Information, Identification, Residency Data, Residency Appeal	Record residency appeal information.
Residency Self-Report	RESIDENCY_SELF	Campus Community, Personal Information, Identification, Residency Data, Residency Self-Report	Enter unofficial, unverified residency information that an individual reports to your institution.

Entering Official Residency Data

Access the Residency Official 1 page (Campus Community, Personal Information, Identification, Residency Data, Residency Official 1).



Residency Official 1 page

Official Residency Data

Effective Term

Enter the term for which the residency data is effective for the individual.

Residency

Select the rule (from the Residency Table page) that describes the individual's residency status.

Residency Date

Enter the date that the individual established or reported the residency.

Additional Residency Data

Admissions

Specify the type of residency that qualifies the individual for admission to the specified institution.

Fin Aid Federal Residency (financial aid federal residency)

Specify the type of residency that qualifies the individual to receive financial aid from the federal government.

Fin Aid State Residency (financial aid state residency)

Specify the type of residency that qualifies the individual to receive financial aid from the state.

Tuition

Specify the type of residency that qualifies the individual for tuition assistance.

Admission Residency Exception

Specify the exception from your institution's residency rule for admissions (from the Residency Exception Table page) that applies to the individual.

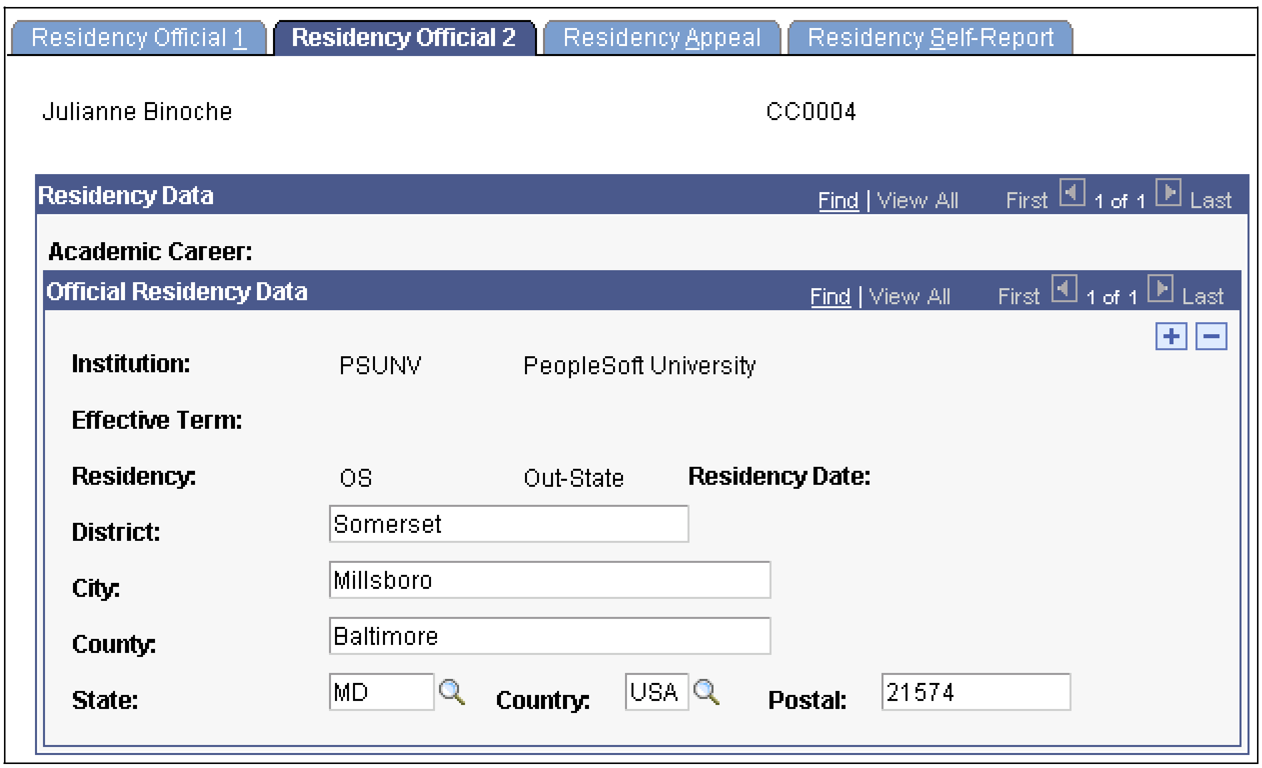
Fin Aid Fed Residency Exception (financial aid federal residency exception)
: Specify the exception from the federal residency rule for financial aid (from the Residency Exception Table page) that applies to the individual.

Fin Aid St Residency Exception (financial aid state residency exception)
: Specify the exception from the state residency rule for financial aid (from the Residency Exception Table page) that applies to the individual.

Tuition Residency Exception
: Specify the exception from your institution's residency rule for tuition (from the Residency Exception Table page) that applies to the individual.

Entering Official Residency Location Details

Access the Residency Official 2 page (Campus Community, Personal Information, Identification, Residency Data, Residency Official 2).

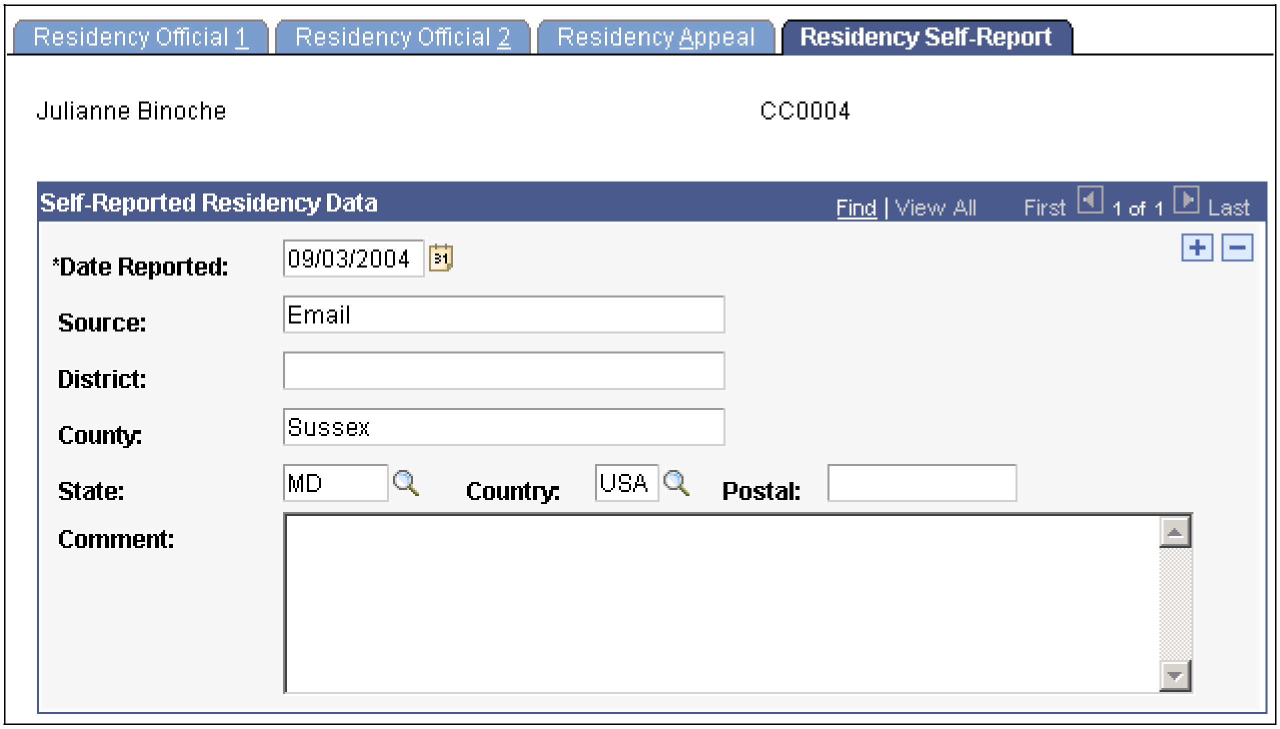


Residency Official 2 page

Enter location details of the residency data for this individual.

Entering Self-Reported Residency Data

Access the Residency Self-Report page (Campus Community, Personal Information, Identification, Residency Data, Residency Self-Report).



Residency Self-Report page

Self-Reported Residency Data

Date Reported

Enter the date on which this residency information is reported to your institution. The default date is the system's current date. You can override the default date.

Source

Enter a description of the source of this residency information. This can be an individual's name, the method of reporting (such as letter, email, telephone conversation, and so on), or the title of a document that you have chosen to use.

District, County, State, Country, and **Postal**

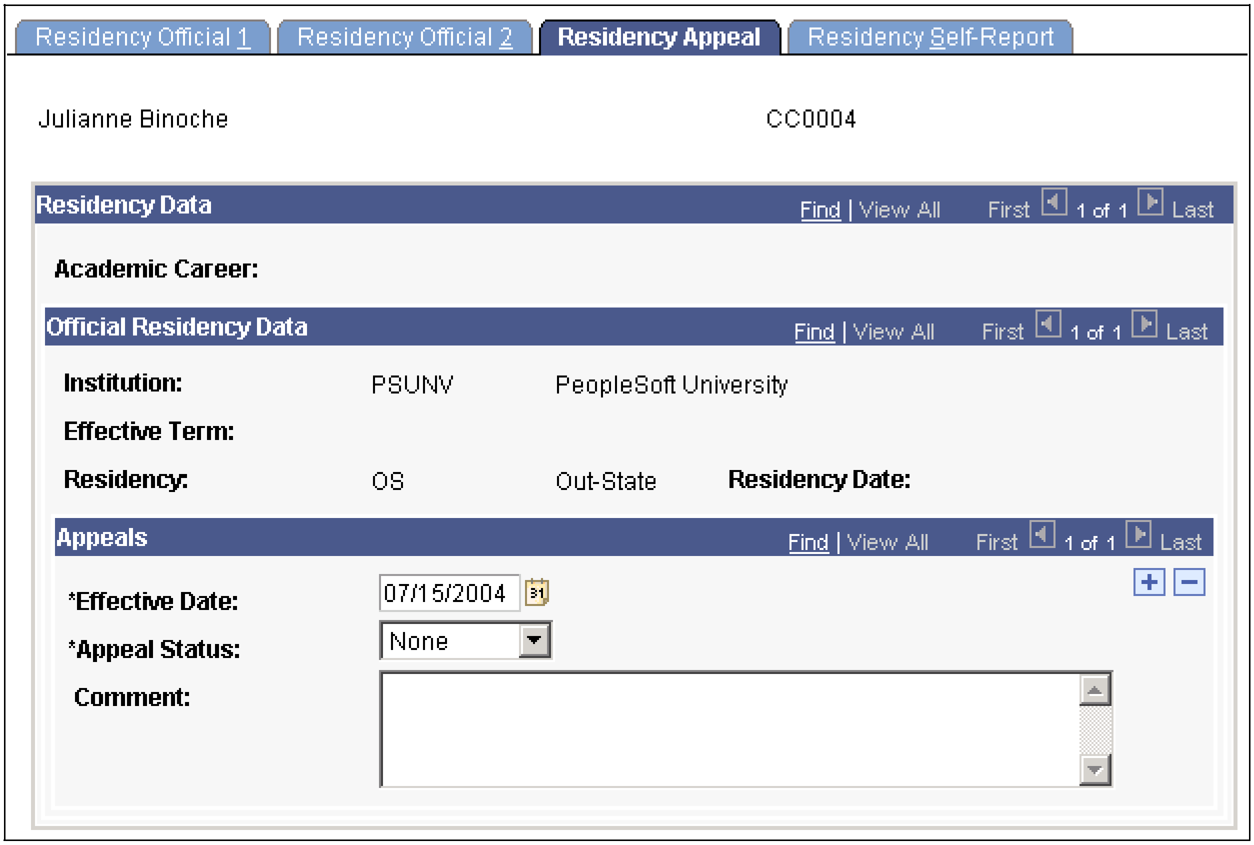
Enter location details for this residency.

Comment

Enter comments to further describe this residency information or further identify the source of the information.

Entering Residency Appeal Data

Access the Residency Appeal page (Campus Community, Personal Information, Identification, Residency Data, Residency Appeal).



Residency Appeal page

Appeals

Effective Date Enter the effective date of the status of this appeal. The default effective date is the system's current date. You can override this date.

Appeal Status Select the current status of this appeal (for example *Accepted, Denied, In Progress, None,* or *Suspended*).

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comment Enter comments to further describe or identify the nature of this appeal.

Entering Photographs

This section lists prerequisites and discusses how to enter a photograph into your database.

Prerequisites

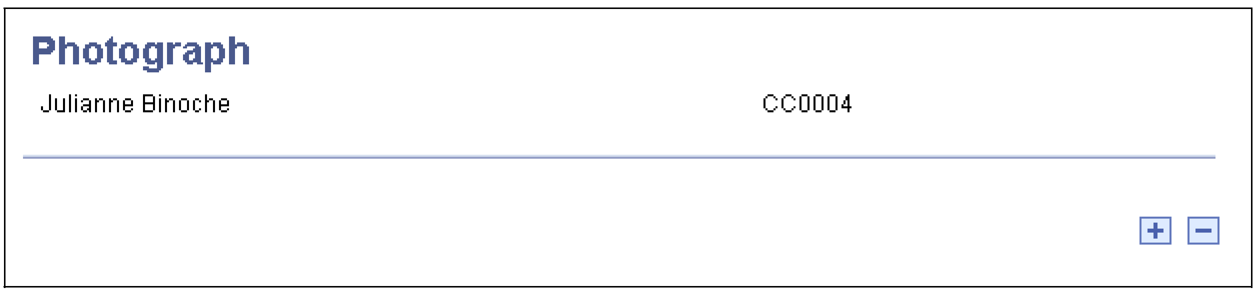
Before you can enter a photograph into your database, you must scan or digitally load the photo onto your computer and save it in *JPEG* format. Consult your platform manufacturer's documentation for information about imaging for the particular database platform that you are using.

Page Used to Enter Photographs

Page Name	*Definition Name*	*Navigation*	*Usage*
Photograph	PHOTO_PERS	Campus Community, Personal Information, Identification, Photo	Enter a photograph of an individual into your system.

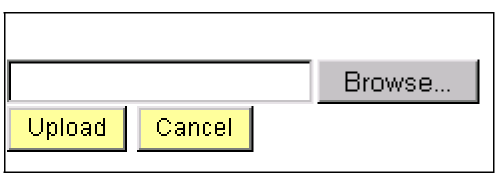
Entering a Photograph

Access the Photograph page (Campus Community, Personal Information, Identification, Photo).



Photograph page

To insert an image, click the plus button to add a row on the Photo page. The following page appears.



Uploading a photo to the Photo page

Browse to, or enter the path to the .JPG image of the individual on your computer and click Upload. After the system uploads the photo, save the page.

Entering PINs

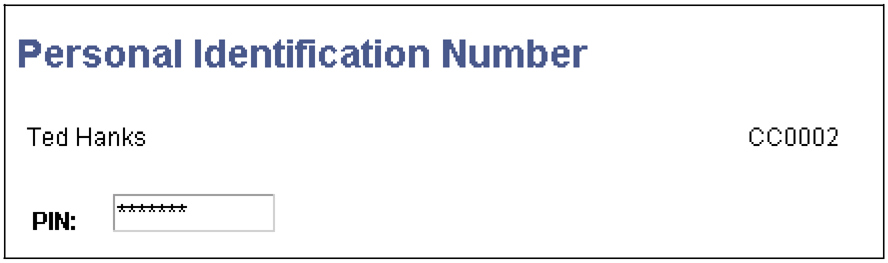
This section discusses how to enter a PIN into your database.

Page Used to Enter Personal Identification Numbers

Page Name	*Definition Name*	*Navigation*	*Usage*
Personal Identification Number	PIN	Campus Community, Personal Information, Identification, PIN	Maintain an individual's personal identification number in your system.

Entering a Personal Identification Number

Access the Personal Identification Number page (Campus Community, Personal Information, Identification, PIN).



Personal Identification Number page

PIN

Enter the PIN for this individual.

PINs can be up to nine alphanumeric characters. To ensure confidentiality, the characters appear as asterisks as you enter them.

Chapter 41

Managing Participation Data

This chapter provides an overview of participation data and discusses how to:

- Enter honors and awards data.
- Enter licenses and certificates data.
- Enter membership data.
- Enter publications data.
- Enter athletic participation data.
- Enter extracurricular activities data.

Understanding Participation Data

You can enter information in your database to indicate the types of accomplishments achieved by individuals at your institution, as well as their association memberships. You can enter data about their athletic participation, extracurricular activities, the licenses and certificates that they hold, the honors and awards that they receive, and the articles or books that they have published.

You can use the codes in your system to identify athletes at your institution and track their athletic participation and eligibility. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events at your institution.

You can also enter data about the books and articles that individuals at your institution have published.

Note. PeopleSoft Campus Self Service, which is licensed separately, provides self-service components for participation data.

Prerequisites

Before entering participation data, you must set up codes and tables to use.

Entering Honors and Awards Data

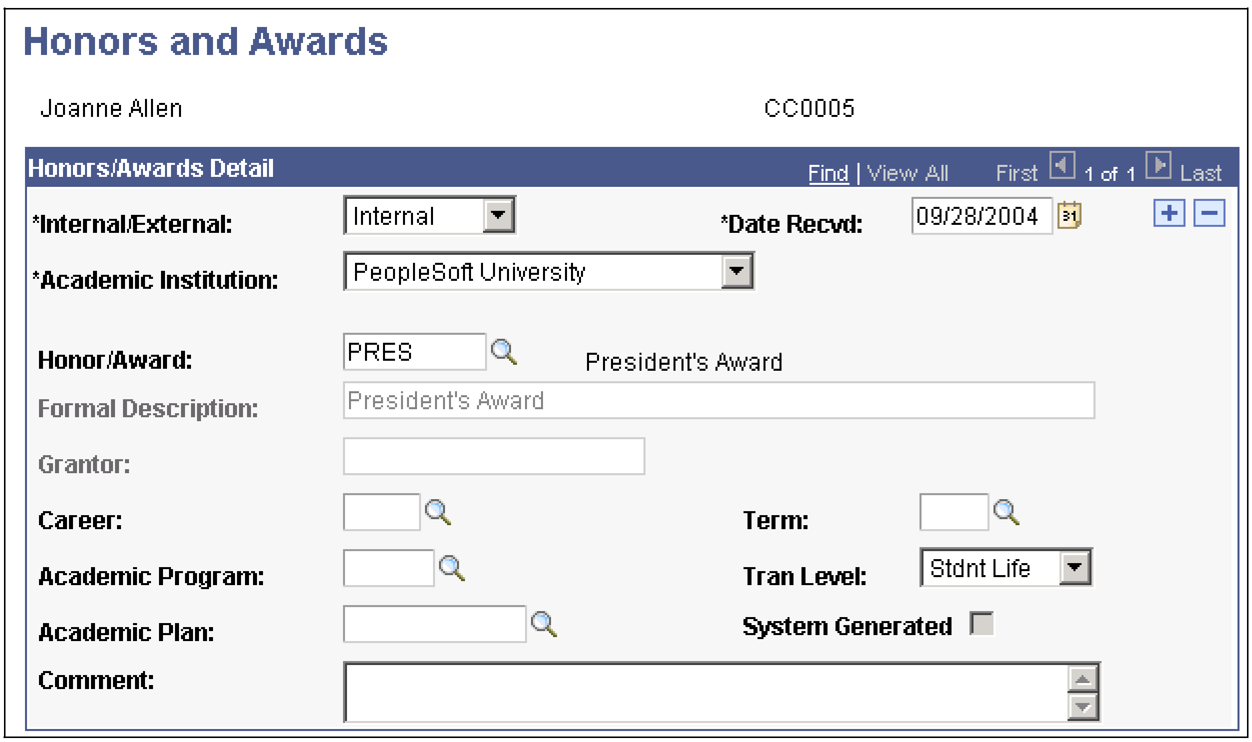
You can enter data about internal and external honors and awards received by individuals at your institution. You can track the external honors and awards of interest to your institution. You can include internal awards on transcripts and for setting up graduation.

Page Used to Enter Honors and Awards Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Honors and Awards	HONORS_AWARDS_CS	Campus Community, Personal Information, Accomplishments, Honors and Awards	Enter internal and external honors and awards received by individuals at your institution.

Entering an Honor or Award

Access the Honors and Awards page (Campus Community, Personal Information, Accomplishments, Honors and Awards).



Honors and Awards page

Honors/Awards Detail

Internal/External

Select the type of honor or award that the individual received. Values are:

Internal

External

Honor/Award

Select the honor or award that was received. The available honors and awards are from the Honors/Awards Table page.

Career, Academic Program, Academic Plan, Term, and **Tran Level** (transcript level)

These fields appear when you select *Internal.* The transcript level that was set on the Honors/Awards Table page for the selected honor or award appears as the default value in the Tran Level field. You can override it to select a different transcript level on which to include this honor or award.

Enter values in the other fields as required by your institution for internal honors and awards.

Entering Licenses and Certificates Data

You can enter data about the credentials and certifications earned by individuals at your institution. You can also indicate whether the license or certificate requires renewal, and if so, when.

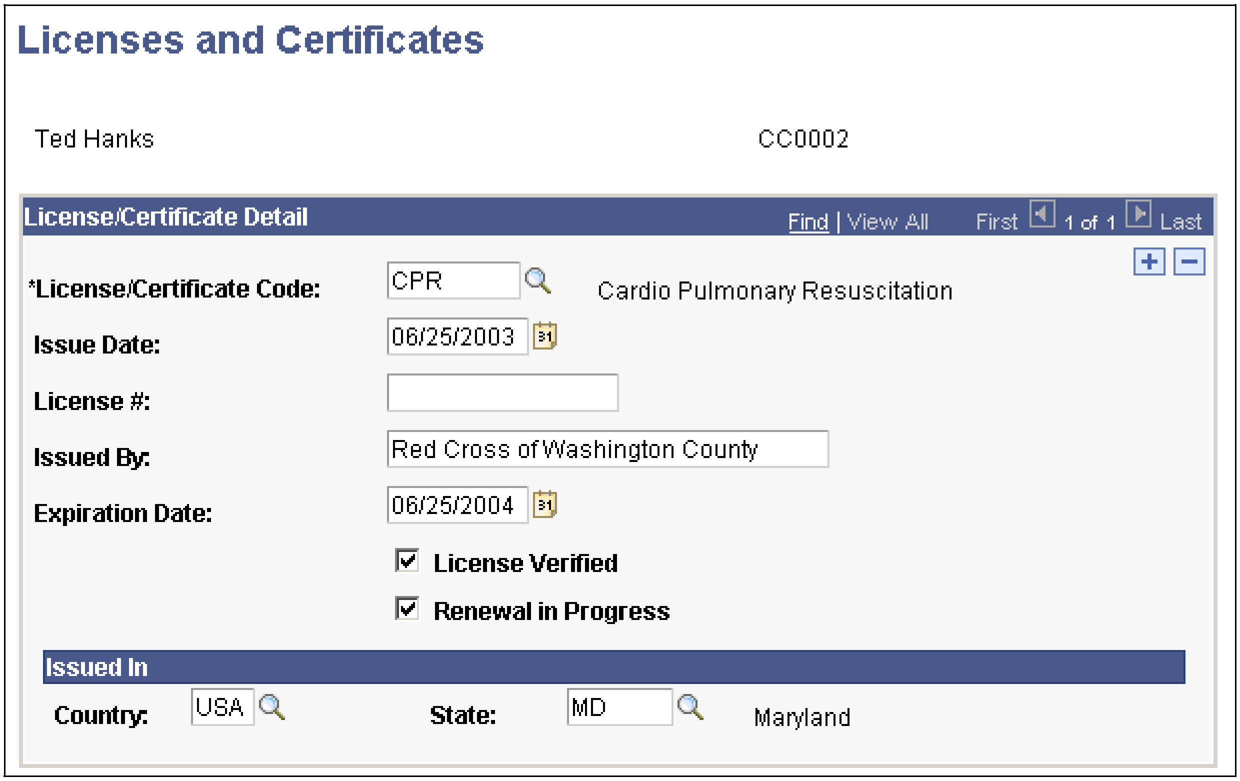
This section discusses how to enter license and certificate data.

Page Used to Enter License and Certificates Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Licenses and Certificates	SCC_LICENSE_CERT	Campus Community, Personal Information, Participation Data, Accomplishments, Licenses and Certificates	Enter license and certificate data to track the permits, licenses, and certifications held by an individual.

Entering Licenses and Certificates Data

Access the Licenses and Certificates page (Campus Community, Personal Information, Participation Data, Accomplishments, Licenses and Certificates).



Licenses and Certificates page

License/Certificate Detail

License/Certificate Code Select the code for the license or certificate to track for the individual.

Issue Date Enter the date on which the license or certificate was officially issued.

License # Enter the license number or other unique identification number assigned to the specific license or certificate by the issuing agent.

Issued By Enter the name of the agency or authority that issued the license or certificate.

Expiration Date Enter the date on which the license or certificate is scheduled to expire.

License Verified Select to indicate that your institution has verified that this individual holds this license or certificate.

Renewal in Progress Select to indicate that the individual is in the process of renewing this license or certificate.

Issued In

Country Specify the country in which the license or certificate was issued.

State Specify the state or province in which the license or certificate was issued.

Entering Memberships Data

You can select from the organizations in your database to indicate an individual's association with that organization. If the individual belongs to an organization that is not in your database, you might want to add the organization on the Membership Table page so that you can track the individuals at your institution who belong to it.

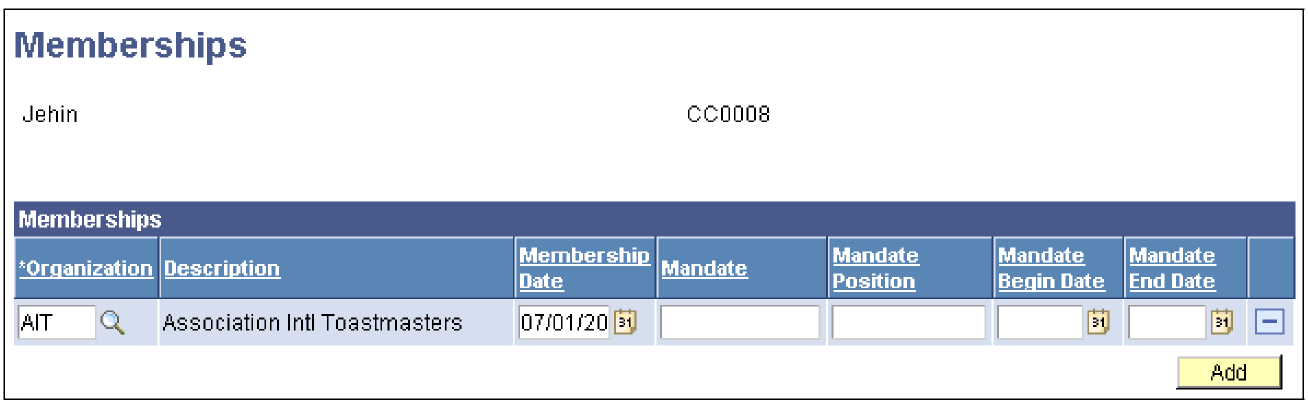
This section discusses how to enter memberships data.

Page Used to Enter Memberships Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Memberships	SCC_MEMBERSHIPS	Campus Community, Personal Information, Participation Data, Accomplishments, Memberships	Enter memberships data to identify the organizations of which an individual is a member.

Entering Membership Data

Access the Memberships Page (Campus Community, Personal Information, Participation Data, Accomplishments, Memberships).



Memberships page

Organization and **Description** Select the code for the organization of which this individual is a member.

Membership Date Enter the date on which the individual's membership began.

Mandate, Mandate Position, Mandate Begin Date, and **Mandate End Date**	Enter data to describe the organization's mandate or purpose of membership.

Entering Publications Data

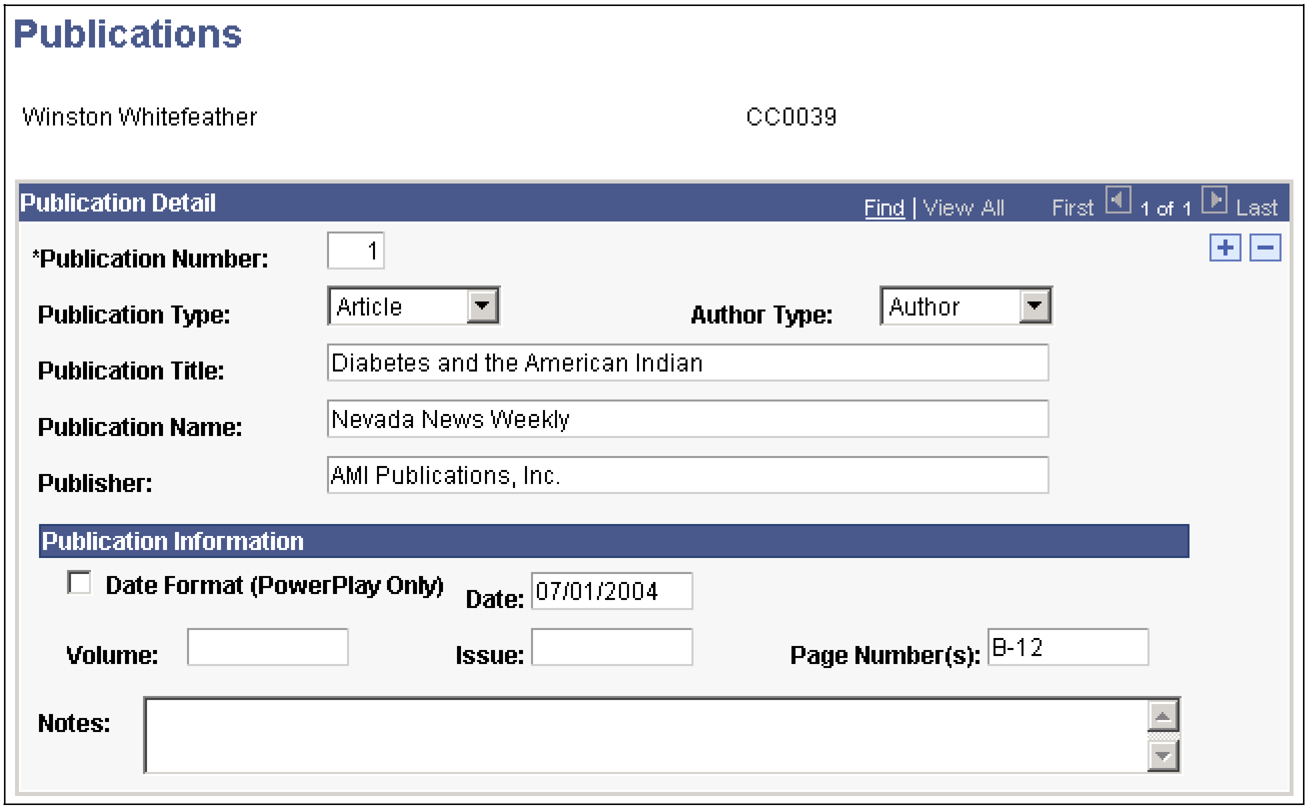
This section discusses how to enter publications data.

Page Used to Enter Publications Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Publications	LS_PUBLICATIONS	Campus Community, Personal Information, Participation Data, Accomplishments, Publications	Enter publications data for an individual.

Entering Publications Data

Access the Publications page (Campus Community, Personal Information, Participation Data, Accomplishments, Publications).



Publications page

Publication Detail

Publication Number

The number of this publication in the list of publications for this individual.

The system enters the next sequential number for each publication that you add. You can override the number to reorder the list of publications.

Publication Type

Specify the type of publication, such as article, book, presentation, record, thesis, or video.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Author Type

Specify the type of this individual's authorship participation in the publication, such as author, co-author, or editor.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Publication Title

Enter the title of the publication.

Publication Name

Enter the name of the magazine, journal, book, or other, in which the publication appeared.

Publisher

Enter the name of the publisher of the magazine, journal, book, or other medium in which the publication appeared.

Publication Information

Date Format For PowerPlay	Select to indicate whether the value in the Date field must be selected from the calendar feature or entered in a valid date format. If you do not select this check box, the value in the Date field can be any value or format of up to 10 characters.
Date	Enter the date of the publication.
Volume	Enter the volume, if any, of the magazine, journal, book, or other medium in which the publication appeared.
Issue	Enter the issue, if any, of the magazine, journal, book, or other medium in which the publication appeared.
Page Number(s)	Enter the page numbers, if any, of the magazine, journal, book, or other medium in which the publication appeared.
Notes	Enter notes or comments to further identify or describe the publication by this individual.

Entering Athletic Participation Data

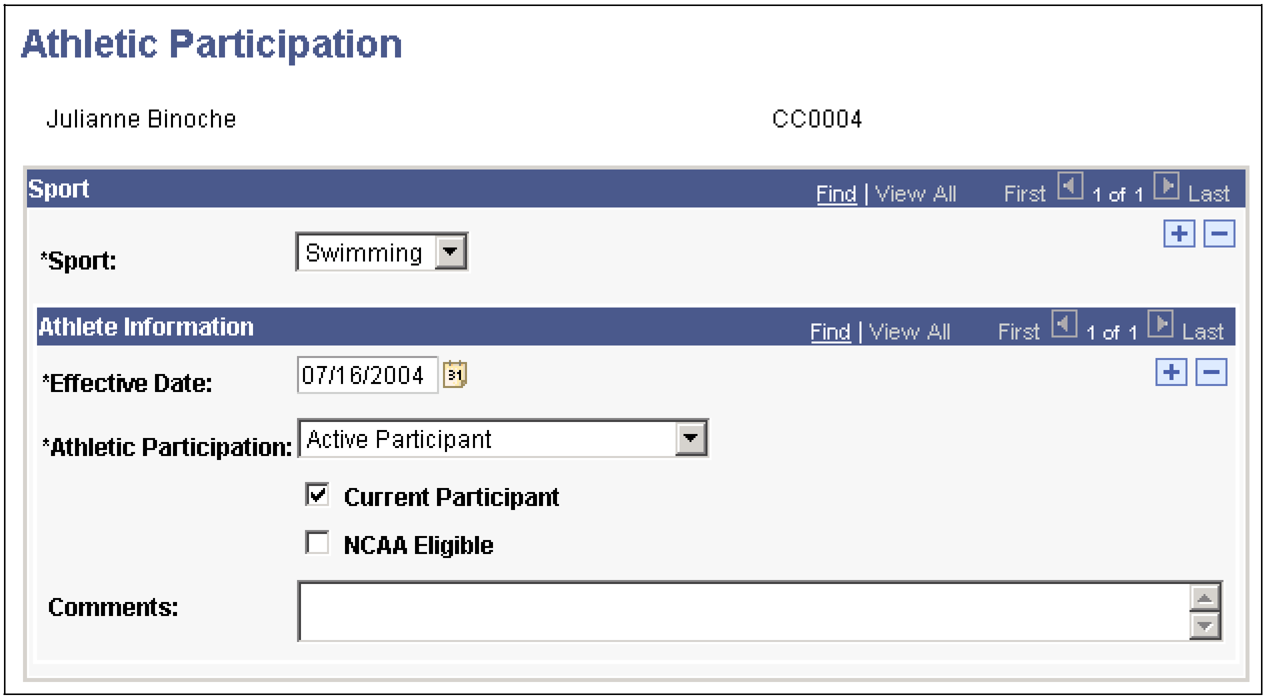
This section discusses how to enter athletic participation data.

Page Used to Enter Athletic Participation Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Athletic Participation	ATHLETES	Campus Community, Personal Information, Participation Data, Athletic Participation	Enter athletic participation data to help track an individual's participation at your institution.

Entering Athletic Participation Data

Access the Athletic Participation page (Campus Community, Personal Information, Participation Data, Athletic Participation).



Athletic Participation page

Sport

Sport

Select the sport in which this individual participates.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Athlete Information

Athletic Participation

Indicate the level or status of the individual's participation in the specified sport, such as active participant, manager, not recruited, or recruited.

Current Participant

Select to indicate that this individual currently participates in this sport.

NCAA Eligible

Select to indicate that the individual is eligible to participate on an NCAA (National Collegiate Athletic Association) team for this sport.

Comments

Enter comments to further identify or describe the individual's level or status of participation in the specified sport.

Entering Extracurricular Activities Data

You can use the codes in your system to identify extracurricular activities and track participation in them. Some codes for levels of involvement are delivered with your system. You can create additional codes to identify the levels of involvement in athletic teams and events.

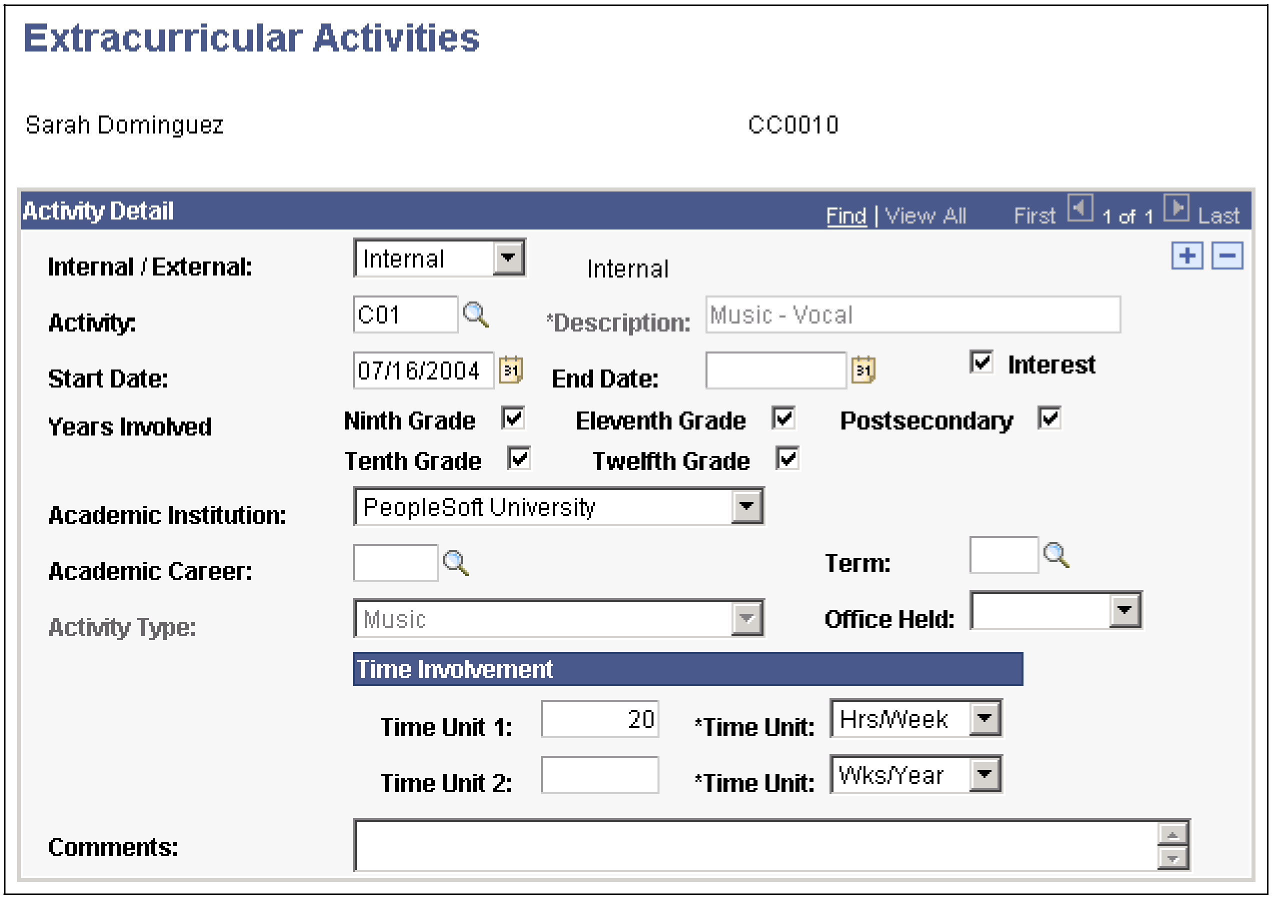
This section discusses how to enter extracurricular activities data.

Page Used to Enter Extracurricular Activities Data

Page Name	Definition Name	Navigation	Usage
Extracurricular Activities	LS_EXTRA_ACTVTY	Campus Community, Personal Information, Participation Data, Extracurricular Activities	Enter extracurricular activities data to track internal or external student activities for an individual.

Entering Extracurricular Activities Data

Access the Extracurricular Activities page (Campus Community, Personal Information, Participation Data, Extracurricular Activities).



Extracurricular Activities page

Internal/External

Specify whether the activity in which the individual participates, is within or outside of your institution.

Activity

Select the activity code, from the Extracurricular Activities Table page, which represents the activity in which the individual participates.

Description

The system displays the description associated with the specific activity code on the Extracurricular Activities Table page.

Note. You can manually enter an activity description without selecting a code. However, to be sure that the activity will be included in FERPA and other processes that depend on the codes, you should consider setting up the activity on the Extracurricular Activities Table page.

Start Date

Enter the date on which the individual's participation in this activity is scheduled to begin. The default start date is the system's current date. You can override this date.

End Date

Enter the date on which the individual's participation in this activity is scheduled to end.

Interest	Select to indicate that the individual expresses an interest in participating in this activity while at your institution.
Years Involved	Select the appropriate check boxes to indicate the years during which the individual participated in this type of activity.
Academic Institution	The system displays the academic institution of the student, unless the student has more than one, in which case you must select the relevant institution.
Academic Career	The system displays the academic career of the student, unless the student has more than one, in which case you must select the relevant career.
Term	Specify the term during which this individual is scheduled to participate in this activity.
Activity Type	The system displays the activity type associated with the specified activity code on the Extracurricular Activities Table page.
Office Held	Specify the office, if any, that this individual holds in this activity, such as captain, EIC, president, treasurer, or vice president. Values for this field are delivered with your system as translate values. You can modify these translate values.
Time Unit 1 and **Time Unit 2**	Enter the amount of time that the individual devotes to this activity. Enter the number in the first field and select a time period in the second field. Values for the second field are: *Days/Month* *Hrs/Week* *Wks/Year* The default value is *Hrs/Week.* If you specify the number of hours per week in theTime Unit 1 field, you should also specify the number of weeks per year that the individual devotes to the activity in the Time Unit 2 field.
Comments	Enter comments to further identify or describe the individual's participation in this activity.

Chapter 42

Managing FERPA Privacy Control

This chapter provides an overview of managing data privacy to comply with the U.S. Family Educational Rights and Privacy Act (FERPA) requirements or other privacy requirements that your institution might have and discusses how to:

- Apply FERPA control.
- Determine releasable information.

Understanding FERPA

Under FERPA regulations, institutions can release directory information about a student, provided that the student has reasonable opportunity to prohibit, in writing, the disclosure of such information.

FERPA regulations define which items qualify as directory information; however, each institution must identify and make known which of those items it plans to publish or share as directory information. PeopleSoft delivers examples of typical directory information in the FERPA_VW control tables. You must configure these examples to reflect your institution's directory information. Even though FERPA is named after a U.S. regulation, the feature is flexible and can be used to define privacy settings for any personal sensitive data.

Note. Not all information defined as potential FERPA directory information is controlled by the delivered FERPA functionality. You may need to expand or modify the delivered records and views if other information about students is subject to FERPA regulations or should be treated as confidential according to your institution's policy. For more information about your institution's or FERPA's definition of directory information, contact your institution's registrar's office. Other resources on FERPA directory information and other regulations include: The Family Policy Compliance Office, U.S. Department of Education, and the American Association of Collegiate Registrars and Admissions Officers (AACRAO).

Under FERPA, students can prohibit the release of directory data about themselves. With PeopleSoft FERPA functionality, students can restrict data, but they can also give you permission to release some or all of that restricted data for inclusion in specific internal publications.

 (FERPA privacy shade)	When you apply FERPA control to restrict data for a student, the system attaches a FERPA window shade privacy button to that individual's records in your database.

Click the FERPA privacy button on a page about that individual to quickly determine the information that is legally releasable to others at your institution or to third-party vendors about that individual. You can also navigate directly to the FERPA Display inquiry pages for each type of information (biographical data, addresses, activities, and so on) to determine the same information.

Prerequisites

Before you can apply and manage FERPA control, you must establish FERPA control fields. Before you can enable students to identify publications for which they release FERPA restrictions, you must set up your institution's publications.

Applying FERPA Control

When students exercise rights under FERPA, they identify information that they do not want your institution to release about themselves. You must apply FERPA control to identify this information and prohibit the release of restricted information across your institution. Students have the option of permitting your institution to release any of the restricted information to specific internal publications.

You can use the FERPA page or the FERPA Quick Entry page to apply FERPA control from the administrative side or, if your institution has purchased PeopleSoft Campus Self Service, you can make students responsible for applying their own FERPA control over the internet from the FERPA self-service page.

This section discusses how to:

- Apply or release FERPA restrictions.
- Use the FERPA Quick Entry page.
- Release FERPA data to publications.

Note. If your institution has licensed and implemented PeopleSoft Campus Self Service, students can use the FERPA self-service page to apply their own FERPA restrictions and to identify which restricted information your institution can include in specific internal publications.

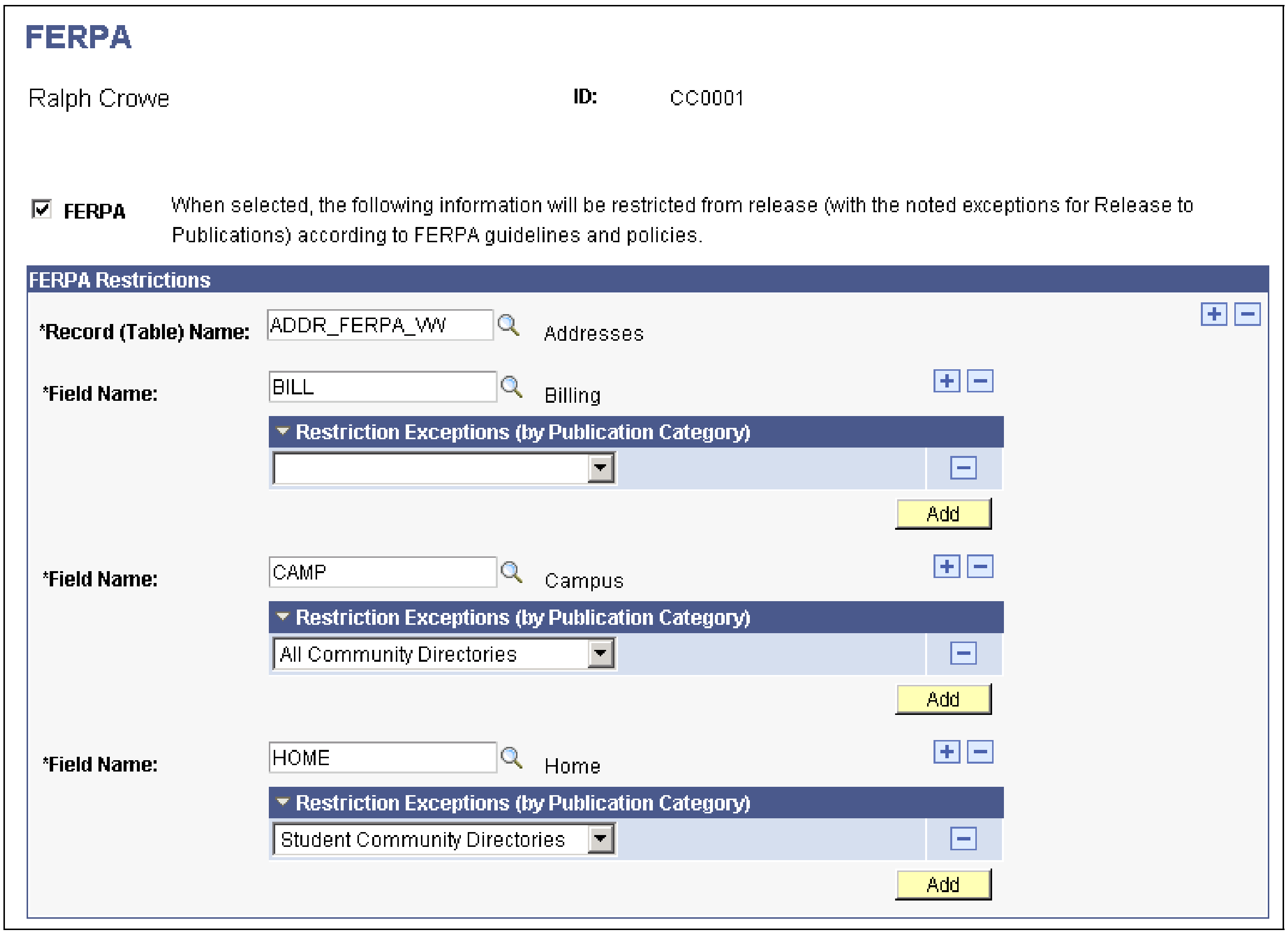
Pages Used to Apply FERPA Privacy Controls

Page Name	***Definition Name***	***Navigation***	***Usage***
FERPA	FERPA	Campus Community, Personal Information, Biographical, Person FERPA, FERPA	Apply or release FERPA restrictions to selected data for an individual.
FERPA Quick Entry	FERPA_ADMIN_QENTRY	Campus Community, Personal Information, Biographical, Person FERPA, FERPA Quick Entry	Apply or release FERPA restrictions to selected data for an individual.

Page Name	***Definition Name***	***Navigation***	***Usage***
Release To Publication	INST_PUB_CATG_SEC	Click the Release To Publication link that appears on the FERPA Quick Entry page when an item is selected on the FERPA Quick Entry page.	Specify or review publications to which restricted data may be released.

Applying or Releasing FERPA Restrictions

Access the FERPA page (Campus Community, Personal Information, Biographical, Person FERPA, FERPA) or the FERPA Quick Entry page (Campus Community, Personal Information, Biographical, Person FERPA, FERPA Quick Entry).



FERPA page

FERPA

Select this check box to indicate that the student has, in accordance with FERPA, instructed your institution not to release the information about them, and to display the FERPA Restrictions area at the bottom of the page, where you can select the record and field to restrict.

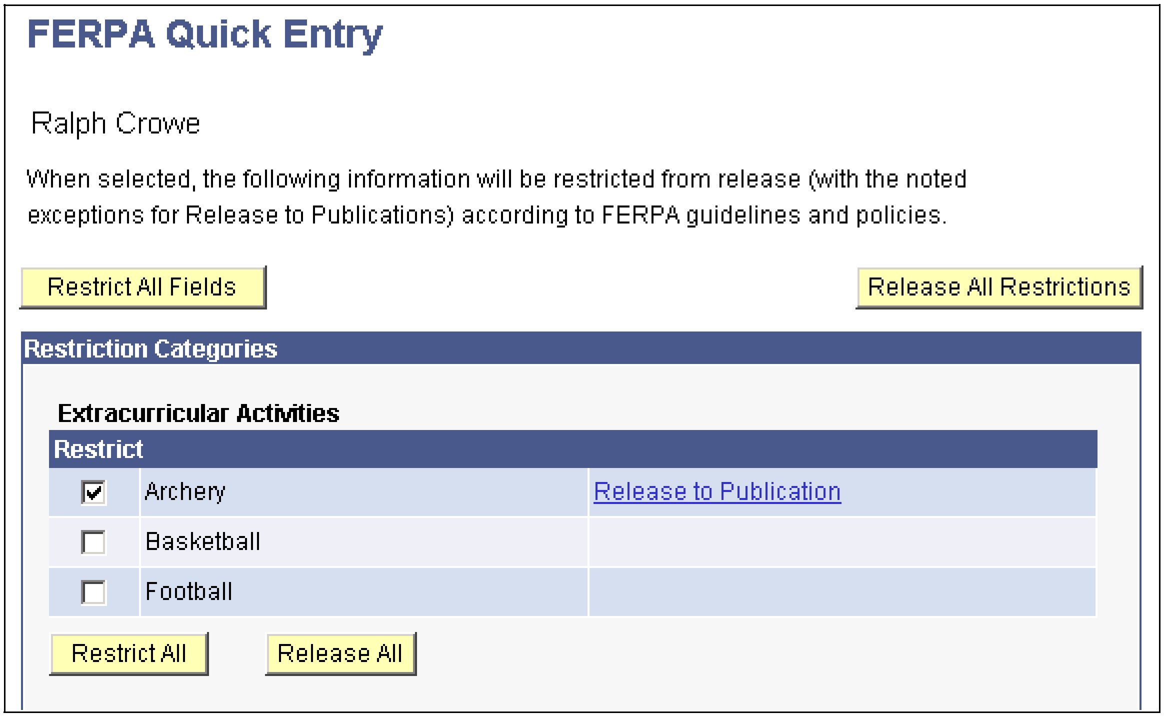
FERPA Restrictions

Record (Table) Name	Enter the name of the FERPA_VW record, from the FERPA Control Page, that contains the type of information the student is restricting.
Field Name	Enter the name of the controlled field on the FERPA_VW record that contains the specific information the student is restricting. The values displayed in the prompt are controlled by the FERPA Control setup page.
Restriction Exceptions (by Publication Category)	Select each of the publications, from the Publications Categories page, to which the student gives you permission to release the otherwise restricted information. *All Community Directories:* Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution's internal community directories. *Student Community Directory:* Indicates that the student gives permission to release the otherwise restricted information for inclusion in your institution's internal student directory only.

Note. Publication categories are used in PeopleSoft Campus Self Service. You can add new categories and add publications to the delivered categories, but do *not* delete the delivered categories.

Using the FERPA Quick Entry

Access the FERPA Quick Entry page (Campus Community, Personal Information, Biographical, Person FERPA, FERPA Quick Entry).



FERPA Quick Entry page (1 of 4)

Addresses

Restrict		
[x]	Billing	Release to Publication
[x]	Business	Release to Publication
[ ]	Campus	
[ ]	Dormitory	
[x]	Home	Release to Publication
[ ]	Legal	
[ ]	Mailing	
[ ]	Other	
[ ]	Other 2	
[ ]	Permanent	
[ ]	Preferred	
[ ]	Veteran	
[ ]	Work	

Restrict All Release All

Email Addresses

Restrict		
[x]	Business	Release to Publication
[ ]	Campus	
[ ]	Dorm	
[x]	Home	Release to Publication
[ ]	Other	

Restrict All Release All

FERPA Quick Entry page (2 of 4)

FERPA Quick Entry page (3 of 4)

FERPA Quick Entry page (4 of 4)

Restrict All Fields Click this check box to select the Restrict option for all fields in all categories on the entire page.

Release All Restrictions Click this button to clear the Restrict option for all fields in all categories on the entire page.

Restriction Categories

The fields that appear for each category are based on the controlled fields identified for each FERPA_VW record on the FERPA Control page.

Note. Extracurricular Activities field names do not appear because the PeopleSoft system does not deliver sample control fields on the ACTVTS_FERPA_VW record. To set control fields for activities, use the FERPA Control page.

Restrict

Select this check box to indicate that the student prohibits the institution from releasing this information.

Release To Publication

Select this link to access the Release To Publication page, where you can enter or review publications to which the restricted data may be released.

Restrict All

Click this button to select the Restrict option for all fields in the category.

Release All

Click this button to clear the Restrict option for all fields in this category.

Releasing FERPA Data to Publications

Access the Release To Publication page (click the Release To Publication link that appears on the FERPA Quick Entry page when an item is selected on the FERPA Quick Entry page).

Release To Publication page

Publication Categories

Select each publication, from the Publication Categories page, to which the student gives you permission to release this specific, otherwise restricted information.

All Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion in all of your institution's internal community directories.

Student Community Directories: Indicates that the student gives permission to release the otherwise restricted information for inclusion your institution's internal student directory only.

Note. Publication categories are used in PeopleSoft Campus Self Service. You can add categories, and add publications to the delivered categories, but you should *not* delete the delivered categories.

Determining Releasable Information

This section provides an overview of how to determine releasable information and discusses how to determine releasable biographical data.

Understanding the Determination of Releasable Information

You can determine releasable information about an individual two ways:

- You can click the FERPA (privacy shade) button on a page about an individual to display the Releasable FERPA Directory Information page.
- You can navigate directly to the FERPA Display pages from the Inquiry menu to review all releasable information about an individual.

Note. Field names appear on the Releasable FERPA Directory Information page and on any of the Review FERPA Display pages only if that type of data is releasable. If a field is releasable but no data exists for it, the field name appears but with no field value. For example, if the individual's birth location is releasable but data for it is not in the system, the field name Birth Location appears on the page, but the field value box beside it is empty.

Pages Used to Determine Releasable Information

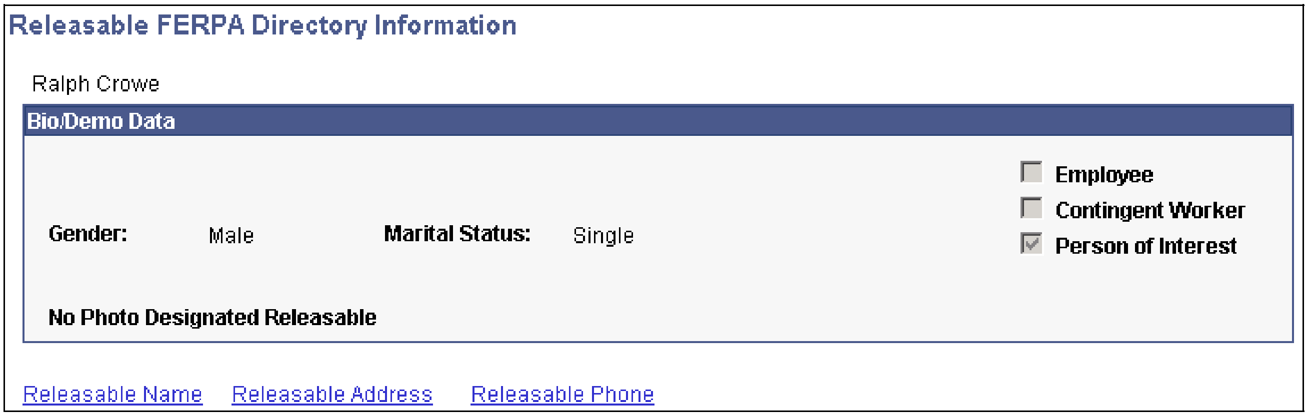
Page Name	***Definition Name***	***Navigation***	***Usage***
Releasable FERPA Directory Information	FERPA_DISPLAY1_SP	Click the FERPA (privacy shade) button from most pages for the individual.	Determine releasable data for an individual, including gender, marital status, and photo.
Releasable Names	FERPA_DSP_NAME_SEC	Click the Releasable Name link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable names for an individual.
Releasable Addresses	FERPA_DSP_ADDR_SEC	Click the Releasable Address link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable addresses for an individual.
Releasable Phone Numbers	FERPA_DSP_PHON_SEC	Click the Releasable Phone link, when available, on the Releasable FERPA Directory page.	Determine the releasable phone numbers for an individual.

Page Name	**Definition Name**	**Navigation**	**Usage**
Releasable Email Addresses	FERPA_DSP_EMAIL_SP	Click the Releasable Email link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable phone numbers for an individual.
Releasable Activity Information	FERPA_DSP_ACT_SEC	Click the Releasable Activities link, when available, on the Releasable FERPA Directory Information page.	Determine the releasable extracurricular activity information for an individual.
FERPA Bio Demo	FERPA_DISPLAY1	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, Bio Demo • Contributor Relations, Constituent Information, People, FERPA Display, Bio Demo	Determine releasable biographical data about an individual, including gender, marital status, and names.
FERPA Addresses	FERPA_DISPLAY2	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Addresses • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Addresses	Determine releasable address data for an individual.
FERPA Phones	FERPA_DISP_PHONES	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Phones • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Phones	Determine releasable phone data for an individual.

Page Name	***Definition Name***	***Navigation***	***Usage***
FERPA Email Address	FERPA_DISP_EMAIL	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Email Addrs • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Email Addrs	Determine releasable email data for an individual.
FERPA Activities	FERPA_DISP_ACTVTS	• Campus Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Activities • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Activities	Determine releasable extracurricular activity data for an individual.
FERPA Photo	FERPA_DISP_PHOTO	• Campus. Community, Personal Information, Biographical, Person FERPA, Review FERPA Display, FERPA Photo • Contributor Relations, Constituent Information, People, FERPA Display, FERPA Photo	Determine if a photo of the individual is releasable.

Determining Releasable Biographical Data

Access the Releasable FERPA Directory Information page (click the FERPA (privacy shade) button from most pages for the individual).



Releasable FERPA Directory Information page

Information displayed on this page is entered on the FERPA page or FERPA Quick Entry page. The Person of Interest or other designation is identified when the individual's record is first created in the database.

Note. When releasable data for the individual exists, the appropriate links (Releasable Name, Releasable Address, Releasable Phone, and so on) are available. If none of the data in a data type is releasable, the link for that data type does not appear.

Releasable Name — Click this link to access the Releasable Name page, where you can view releasable names for this individual.

Releasable Address — Click this link to access the Releasable Addresses page, where you can view releasable addresses for this individual.

Releasable Phone — Click this link to access the Releasable Phone Numbers page, where you can view releasable phone numbers for this individual.

Releasable Email — Click this link to access the Releasable Email Addresses page, where you can view releasable email addresses for this individual.

Releasable Activities — Click this link to access the Releasable Activity Information page, where you can view releasable extracurricular activity information for this individual.

Chapter 43

Managing Service Indicators

This chapter provides an overview of service indicators and discusses how to:

- View, assign, or remove service indicators.
- Audit service indicators.
- Mass assign or mass release service indicators.

Understanding Service Indicators

Use service indicators to provide or limit access to services at your institution for an individual or organization. Service indicators can be holds that prevent an individual or organization from receiving certain services or positive indicators that designate special services to be provided. Service indicators consist of one or more impact values that identify the types of specific services that are restricted or provided.

Examples of negative service indicators include no check cashing privileges, enrollment verification or transcript holds, and denied registration for classes. Positive service indicators include check cashing privileges, front-of-line service, use of the gym, special services for disabled students, and so on.

You might define a positive service impact to permit specific students to receive their student identification cards earlier than the remainder of the student body. You might define a negative service impact that prevents specific students from receiving their student identification cards until, for example, they submit past-due enrollment deposits.

After you define service impacts, you can group them to define service indicators and create service indicator codes. Next, you identify reasons for applying service indicators, and you create codes for those reasons. When you create service indicators and reason codes, administrative users with the appropriate security can assign service indicators to individuals. They can also remove an active service indicator from an ID's record when that service or restriction no longer applies. Automated processes can also be used to assign or remove negative service indicators.

When a service indicator is assigned, the corresponding negative or positive service indicator button appears on most pages about that individual or organization. One button can represent one or several service indicators. You would click the buttons on any of those pages to navigate to the appropriate details page, where you can determine how many and which restrictions apply.

(negative service indicator)	Appears on a page when a negative service indicator is assigned to the individual or organization. Click to access the Manage Service Indicators page, from which you can view details about the service restrictions associated with each negative service indicator for the ID.

(positive service indicator)

Appears on a page when a positive service indicator is assigned to the individual or organization.

Click to access the Manage Service Indicators page, from which you can view details about the service privileges associated with each positive service indicator for the ID.

You can review service indicators in several ways. You can click the service indicator buttons or use menu navigation to access the Manage Service Indicators page, where you can review a list of service indicators currently assigned to an ID. You can also access the Service Indicator Audits page, where you can configure a search for any service indicator information that you want to review. For example, you can specify an ID whose service indicator details you want to review and search for that list; you can specify a service indicator and search for all IDs to whom the indicator is assigned; you can specify an ID and search for all service indicators assigned by that individual; and many other configurations. The search results provide data that identifies the date and time the service indicator was added or deleted and the ID of the user who added or deleted it.

If your institution has licensed PeopleSoft Campus Self Service, students can also view their own active service indicator information on the self-service Holds page.

Viewing, Assigning, or Removing Service Indicators

This section discusses how to:

- View service indicators assigned to an ID.
- Assign a service indicator to an ID.
- Edit an assigned service indicator.

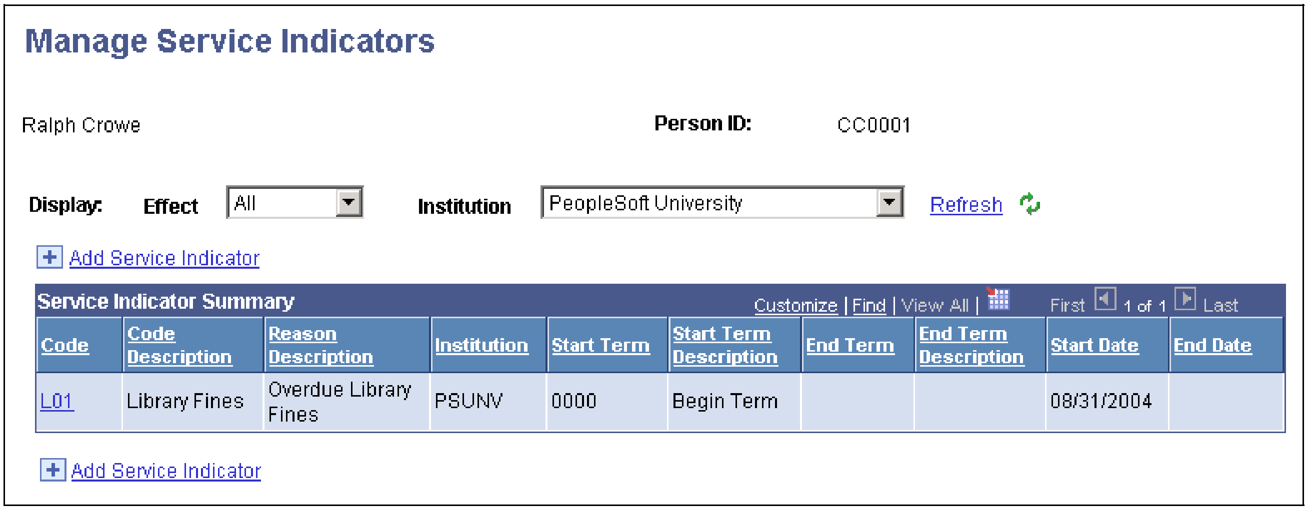
Pages Used to View, Assign, or Remove Service Indicators

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Service Indicators	SRVC_IND_SUMRY	• Campus Community, Service Indicators, Person, Manage Service Indicators • Contributor Relations, Constituent Information, People, Service Indicators, Manage Service Indicators	View service indicators assigned to a person ID.

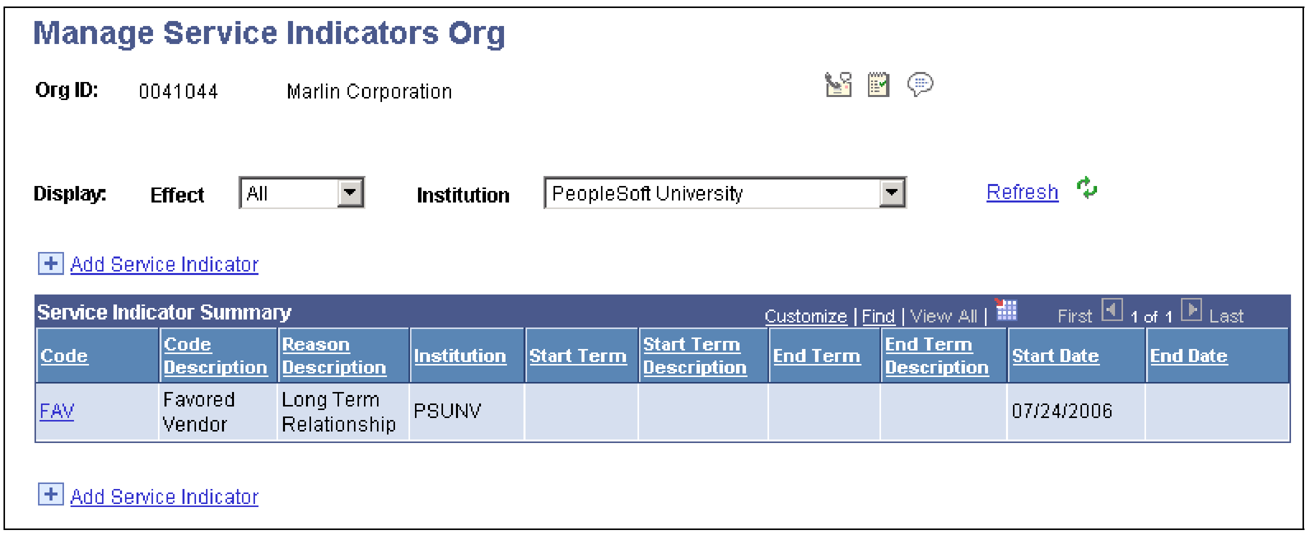
Page Name	Definition Name	Navigation	Usage
Manage Service Indicators Org	SCC_SI_ORG_SUMRY	• Campus Community, Service Indicators, Organization, Manage Service Indicators Org • Contributor Relations, Constituent Information, Organizations, Service Indicators, Manage Service Indicators Org	View service indicators assigned to an organization ID.
Add Service Indicator Edit Service Indicator	SRVC_IND_DATA1	For the Add Service Indicator page, click the Add Service Indicator link on the Manage Service Indicators page for individuals. For the Edit Service Indicator page, click the link for a service indicator in the code column on the Manage Service Indicators page for individuals.	Use the Add Service Indicator page to assign a new service indicator to the person ID. Use the Edit Service Indicator page to view and edit details of a service indicator currently assigned to the person ID.
Add Service Indicator Org Edit Service Indicator Org	SCC_SI_ORG_DATA	For the Add Service Indicator Org page, click the Add Service Indicator link on the Manage Service Indicators Org page. For the Edit Service Indicator Org page, click the link for a service indicator in the Code column on the Manage Service Indicators Org page.	Use the Add Service Indicator Org page to assign a new service indicator to the organization ID. Use the Edit Service Indicator Org page to view and edit details of a service indicator currently assigned to the organization ID.

Viewing Service Indicators Assigned to an ID

Access the Manage Service Indicators page (Campus Community, Service Indicators, Person, Manage Service Indicators).



Manage Service Indicators page (for individuals)



Manage Service Indicators Org page (for organizations)

Note. Assigned service indicators use the current effective-dated service indicator definition on the Service Indicator Codes page. If a new effective-dated row is added to a service indicator definition, the changes to that row will affect existing assignments to IDs as well as new assignments to IDs.

Effect, Institution, and **Refresh**

Select the effect of the service indicators from the available values: *All*, *Positive*, and *Negative*. Enter the institution whose service indicators you want to display for the ID. You must click Refresh to display data according to the effect and institution that you enter.

Add Service Indicator

Click to access the Add Service Indicator page, where you can assign a service indicator to this ID within the associated institution.

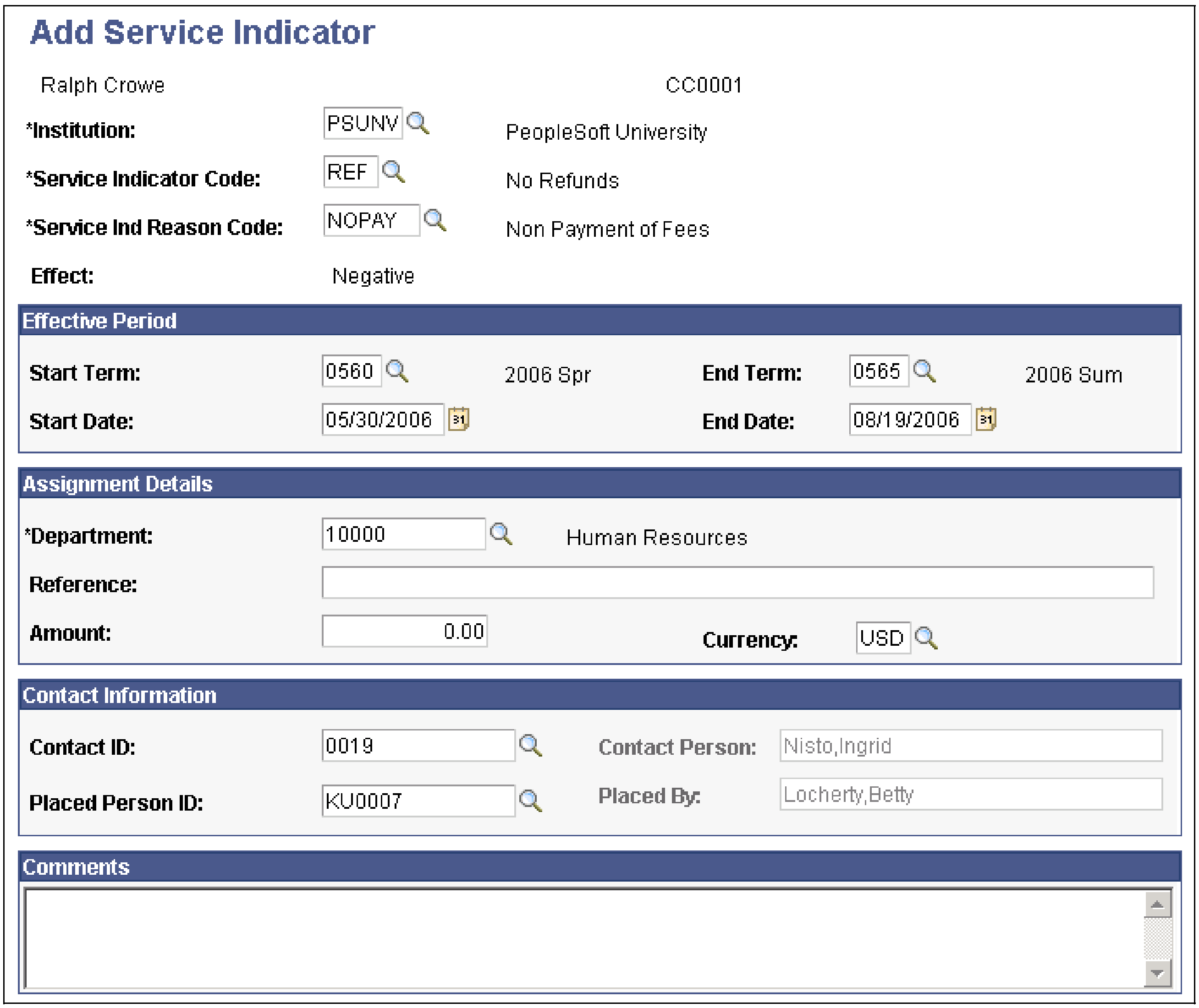
This link appears at both the top and bottom of the page when the list of service indicators is long.

Service Indicator Summary

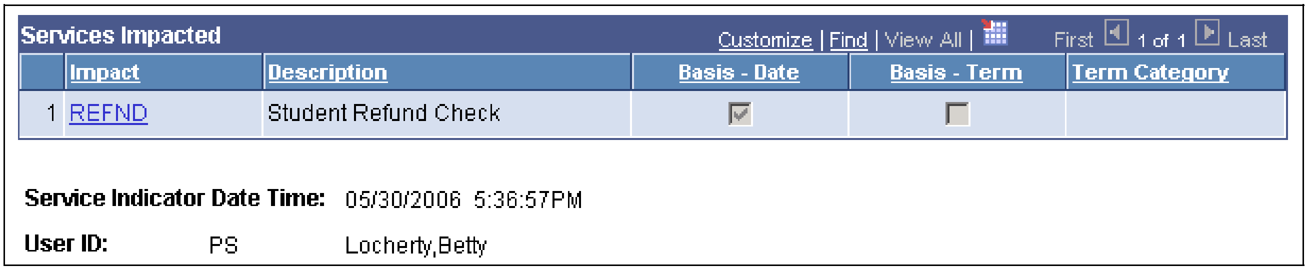
Code Click the service indicator code in the code column to access the Edit Service Indicator page, where you can view and edit details of the assigned service indicator.

Assigning a Service Indicator to an ID

For individuals, access the Add Service Indicator page. (For the Add Service Indicator page, click the Add Service Indicator link on the Manage Service Indicators page for individuals. For the Edit Service Indicator page, click the link for a service indicator in the code column on the Manage Service Indicators page for individuals.)



Add Service Indicator page (1 of 2)



Services Impacted — Customize | Find | View All | First 1 of 1 Last

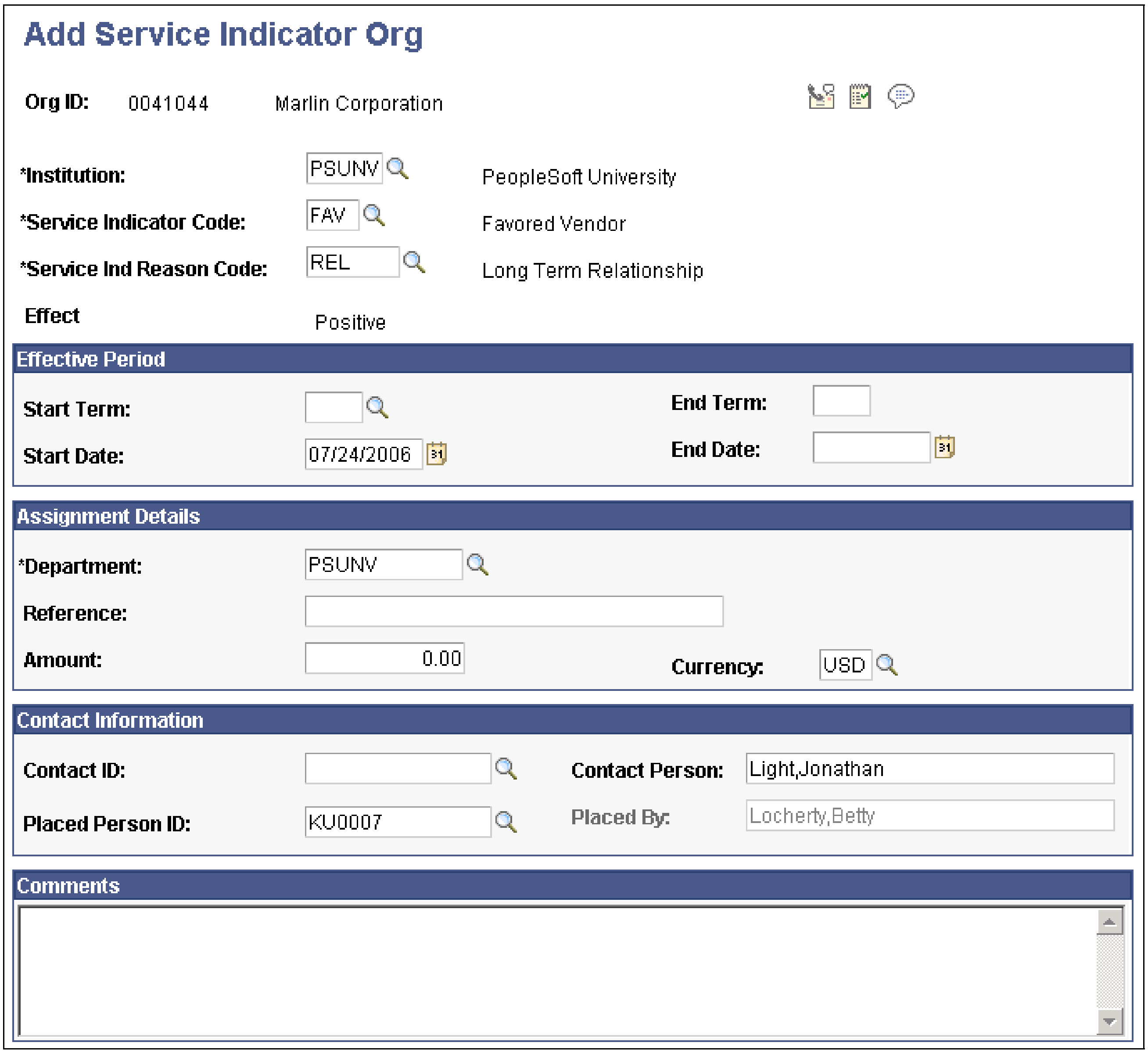
	Impact	Description	Basis - Date	Basis - Term	Term Category
1	REFND	Student Refund Check	☑	☐	

Service Indicator Date Time: 05/30/2006 5:36:57PM

User ID: PS Locherty,Betty

Add Service Indicator page (2 of 2)

For organizations, access the Add Service Indicator Org page. (For the Add Service Indicator Org page, click the Add Service Indicator link on the Manage Service Indicators Org page. For the Edit Service Indicator Org page, click the link for a service indicator in the Code column on the Manage Service Indicators Org page.)



Add Service Indicator Org

Org ID: 0041044 Marlin Corporation

***Institution:** PSUNV PeopleSoft University

***Service Indicator Code:** FAV Favored Vendor

***Service Ind Reason Code:** REL Long Term Relationship

Effect Positive

Effective Period

Start Term: **End Term:**

Start Date: 07/24/2006 **End Date:**

Assignment Details

***Department:** PSUNV

Reference:

Amount: 0.00 **Currency:** USD

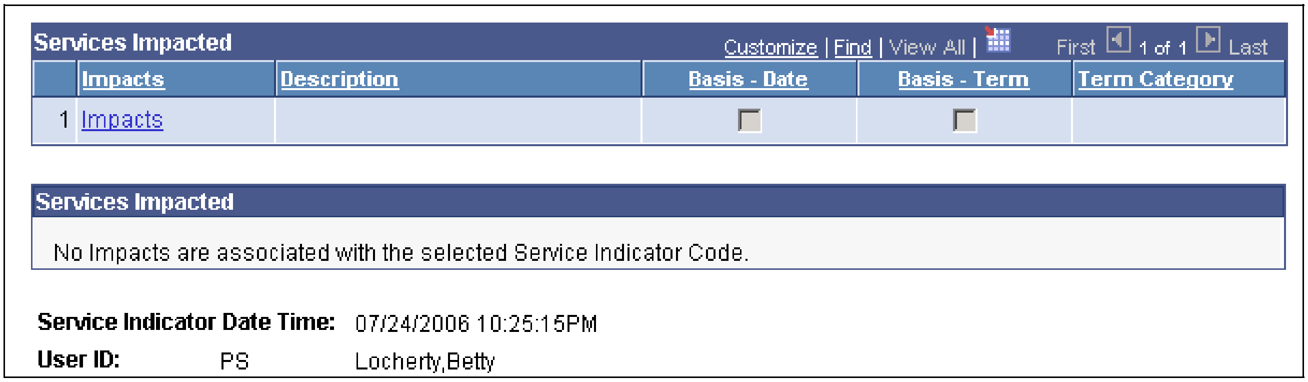
Contact Information

Contact ID: **Contact Person:** Light,Jonathan

Placed Person ID: KU0007 **Placed By:** Locherty,Betty

Comments

Add Service Indicator Org page (1 of 2)



Add Service Indicator Org page (2 of 2)

Institution

Enter the code for the institution that is responsible for this service indicator.

Service Indicator Code

Enter the code for the service indicator to assign to the individual.

Service Ind Reason Code (service indicator reason code)

Enter the reason that you are assigning this service indicator to the individual.

Note. Only the reason codes that are associated with the specific service indicator on the Service Indicator Codes page are available.

Effect

The system displays the effect associated with the service indicator that you select. Values are *Positive* or *Negative.*

Effective Period

You can assign a service indicator with a beginning and an end to its validity for an ID. You can specify a date on which the date-based impacts for a service indicator will take effect, and a date on which they will cease to be in effect. Similarly, you can specify a term at the beginning of which to apply the term-based impacts associated with the service indicator, and specify a term at the end of which to cease to apply the impacts. You can further control the validity period of term-based and date-based impacts. If you do not want the indicator to be valid during the entire start-to-end term period, you can specify dates within either or both terms to use for starting and ending the validity.

Note. The service impacts associated with a service indicator can be term-based or date-based. They are applied or released based on the start and end information that you enter.

Start Term and **End Term**

Enter the term during which the service indicator should become valid for the ID, and enter the term during which it should cease to be valid for the ID.

A Start Term value of *0000* means that term-based impacts will be in effect for all terms. A Start Term value of *9999* means that term-based impacts will never take effect.

If no End Term value is entered, term-based impacts will be in effect until the service indicator is released.

Start Date and **End Date**

Enter the date on which the service indicator should become valid for the ID, and enter the date on which it should cease to be valid for the ID.

If no End Date value is entered, date-based impacts will be in effect until the service indicator is released.

Assignment Details

Department

Enter the department that is responsible for placing the service indicator (or requesting its placement) on the individual's record.

Reference

Enter a reference number or other data that may assist in tracking and identifying the service indicator and its resolution.

Amount

Enter the monetary amount, if any, that is required to satisfy the reason for this service indicator.

Currency

Specify the currency in which the monetary amount is expressed.

Contact Information

Contact ID and**Contact Person**

Enter the ID and name of the person to contact with questions about this service indicator.

Placed Person ID and **Placed By**

The system displays the current user's ID and name. You can override this value to enter whatever your institution requires.

You can enter the ID or, if no ID exists, you can enter the name of the person who placed the service indicator on the individual's record. Enter the name in the lastname;firstname format. Alternatively, you can identify the person who requested that the service indicator be placed on the record.

Comments

Comments

Enter comments to further describe or identify the reason for the service indicator.

Services Impacted

Impact	Click the code in the Impact column to access the Service Impact Description page, where you can view details about the impact.
Basis - Date or **Basis - Term**	The system indicates whether the service impact is set to be considered or disregarded (both manually or in the automated process) based on the begin and end values that you specify for the service indicator. When the *Basis - Term* check box is selected, the impact will start and end for the terms that you specify. If the *Basis - Date* check box is selected, the impact will start and end on the dates that you specify. If either or both of the check boxes are selected but you enter no values for the End Term or End Date fields, then the impact will remain in effect until manually released.
Term Category	Appears only if the impact is term-based. **Note.** This value is provided for informational purposes for administrative users. Delivered processes do not consider the term category. Displays the term of the service impact as it is associated with the service indicator on the Service Indicator Codes page. If the term falls within the Start Term and End Term period and a term category appears, you must determine whether the category of that term matches the category shown. If it does not, you should consider the impact not in effect. For example, a student applies for a parking permit for the Fall 2007 term, which has a term category of *Regular.* You assign the service indicator with a parking impact to the student, but the impact has an associated term category of *Summer.* Because the term begin and end dates of the service indicator do not fall within the dates of the summer term, the impact is not in effect.
Service Indicator Date Time	The system displays the current day and time when the service indicator was assigned.
User ID and **Name**	The system displays the ID of the user who is entering or changing information on the page.

Editing an Assigned Service Indicator

Access the Edit Service Indicator page or the Edit Service Indicator Org page.

The following fields are specific to the Edit Service Indicator page and the Edit Service Indicator Org page. Otherwise, the fields and pages are the same as described for the Add Service Indicator page and Add Service Indictor Org page.

Release	Available only if the user has release security for the institution, service indicator, and reason. Click to release this service indicator from assignment to the ID. The system releases the service indicator and redirects you to the Manage Service Indicators page, which displays a list of the ID's service indicators.
Placed Method	If an automated process is assigned this service indicator, *background* appears. If the service indicator was assigned manually, *manual* appears. If the Mass Assign feature was used to assign the service indicator, *Mass* appears.
Placed Process	The system displays the name of the automated process that placed this service indicator on the individual's record.
Release Process	The system displays the name of the automated process that can release or remove this service indicator from the individual's record.

Auditing Service Indicators

This section discusses how to configure a service indicator audit search.

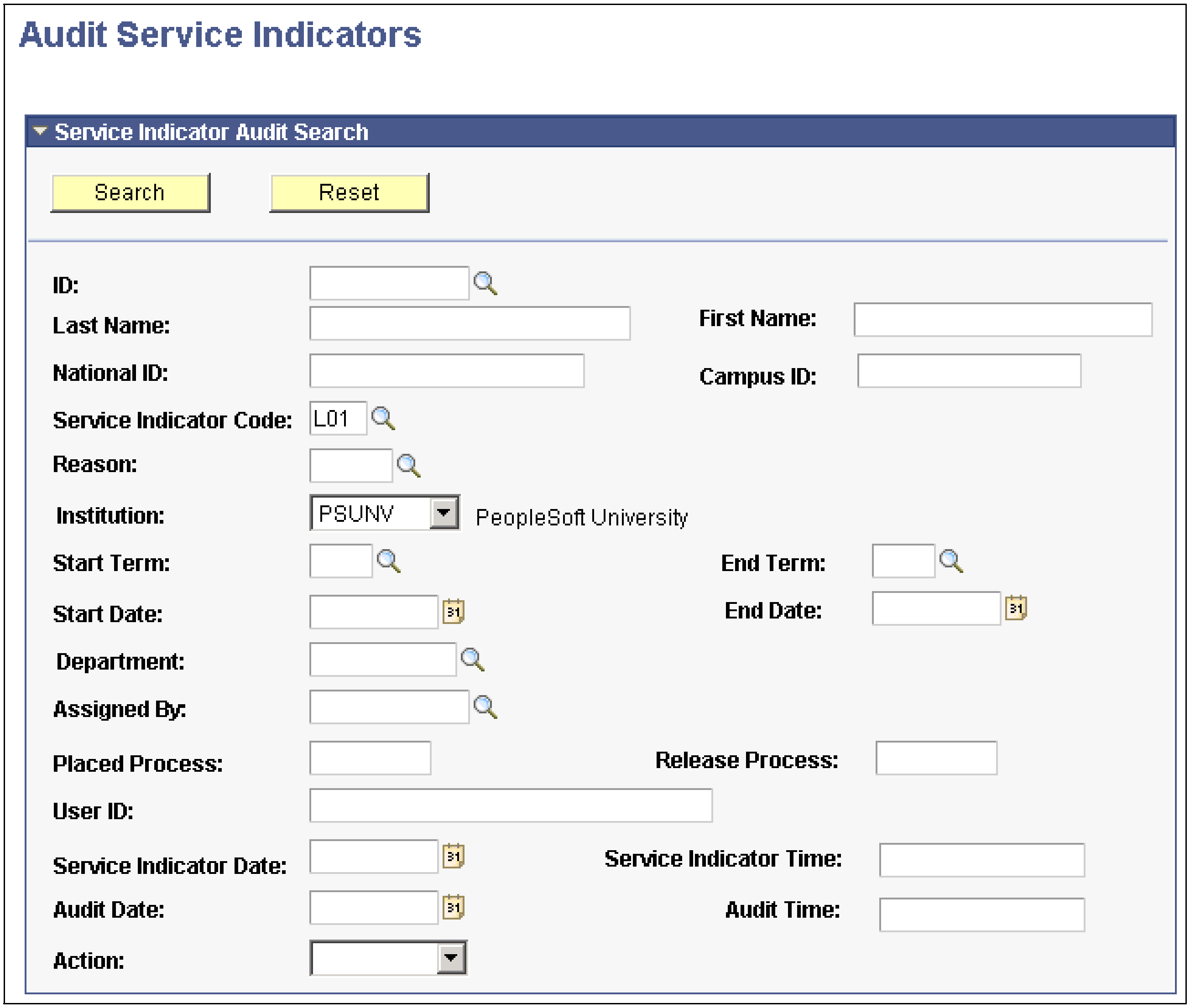
Pages Used to Configure an Audit Service Indicator Search

Page Name	*Definition Name*	*Navigation*	*Usage*
Audit Service Indicators	SCC_SI_AUDIT_SRCH	• Campus Community, Service Indicators, Person, Audit Service Indicators • Contributor Relations, Constituent Information, People, Service Indicators, Audit Service Indicators	View an individual's service indicator history, including the date and time when a service indicator was added or deleted and the ID that added or deleted it.
Audit Service Indicators Org	SCC_SIADT_ORG_SRCH	• Campus Community, Service Indicators, Organizations, Service Indicators, Service Indicator Audits Org • Contributor Relations, Constituent Information, Organizations, Service Indicators, Audit Service Indicators Org	View an organization's service indicator history, including the date and time when a service indicator was added or deleted and the ID that added or deleted it.

Page Name	Definition Name	Navigation	Usage
Service Indicator Audit	SCC_SIAUDIT_DATA	Click the ID or Name link on the Audit Service Indicators search results page, or click the Org IDor Organization link on the Audit Service Indicators Org search results page.	View details of the individual's or organization's assigned service indicator.

Configuring a Service Indicator Audit Search

For individuals, access the Audit Service Indicators page (Campus Community, Service Indicators, Person, Audit Service Indicators).


Audit Service Indicators

Service Indicator Audit Search

Search Reset

ID:

Last Name: First Name:

National ID: Campus ID:

Service Indicator Code: L01

Reason:

Institution: PSUNV PeopleSoft University

Start Term: End Term:

Start Date: End Date:

Department:

Assigned By:

Placed Process: Release Process:

User ID:

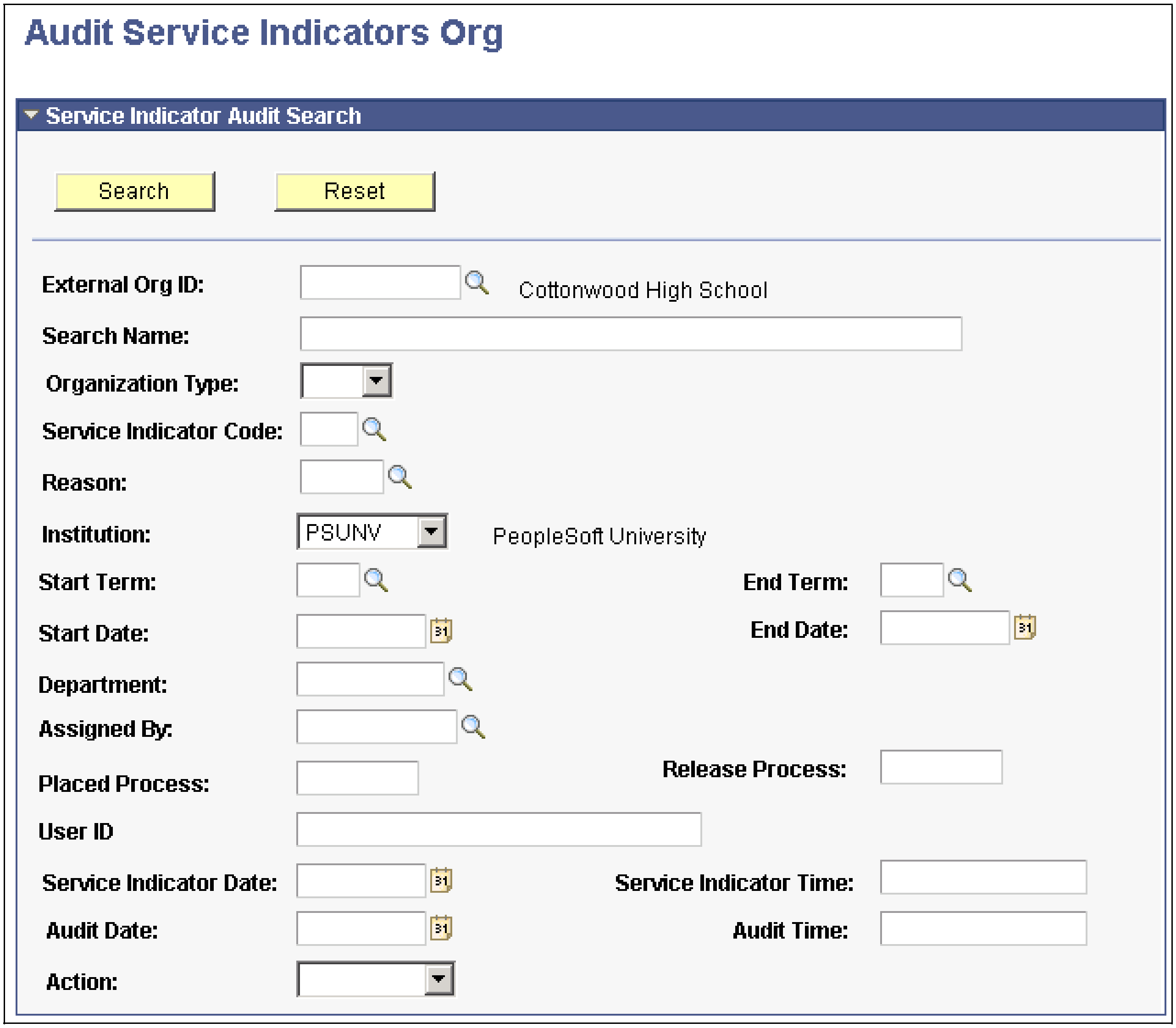
Service Indicator Date: Service Indicator Time:

Audit Date: Audit Time:

Action:

Audit Service Indicators page (for individuals)

For organizations, access the Audit Service Indicators Org page (Campus Community, Service Indicators, Organizations, Service Indicators, Audit Service Indicators Org).



Audit Service Indicators Org page (for organizations)

Service Indicator Audit Search

You can enter as much or as little data as required to define your search. For example, you can enter a service indicator and search for all IDs to whom that indicator is assigned. Alternatively, you can enter the service indicator code, institution, start term and start dates, and assigned by ID and then search for all IDs within that institution to whom the indicator was assigned by the Assigned By ID and will become valid in that term on that date.

Search

Enter criteria to define the search, and then click Search.

When you click Search, the system redirects you to a different view of the page, the Service Indicator Audits search results list view, which lists service indicator information based on that search.

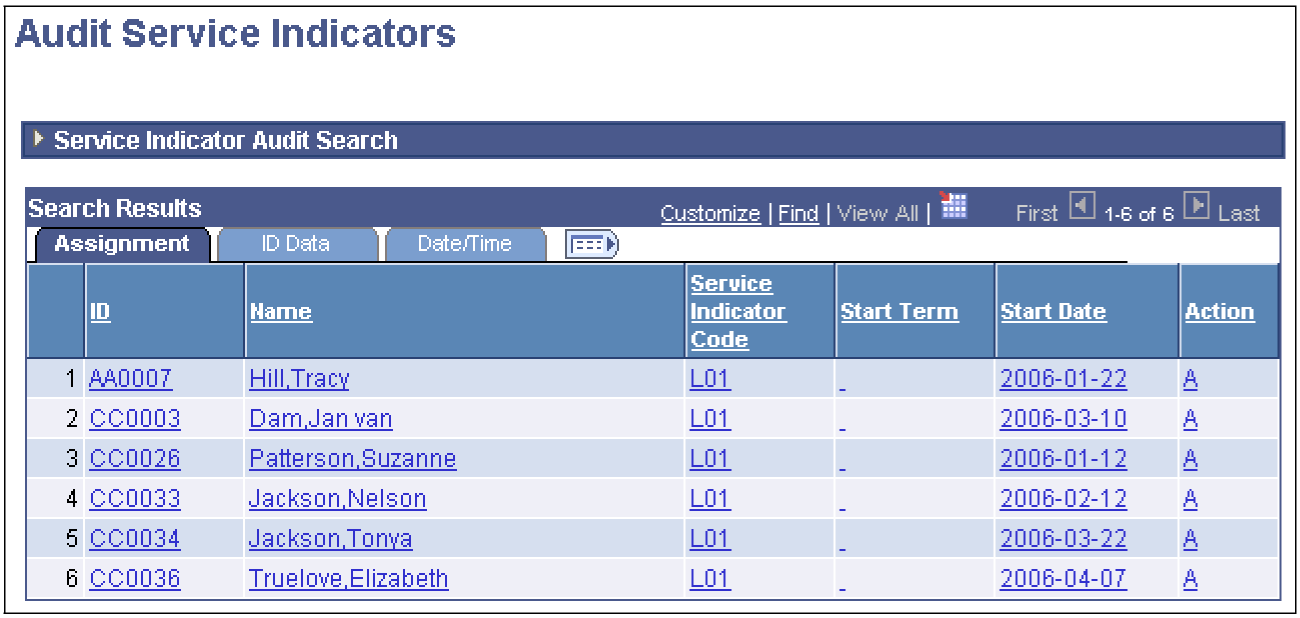
Reset Click to clear the data fields so you can enter data for a new search.

The Institution field will automatically repopulate with the user's default institution if one is defined in Operator Defaults. You can clear or change it manually, if necessary.

Search Results

When you click Search, the Search Results list appears. Click the expand button next to Service Indicator Audit Search to see the top part of the Service Indicator Audits page, which shows the search criteria used to produce these results.

This example shows an Audit Service Indicators page:


Audit Service Indicators

Service Indicator Audit Search

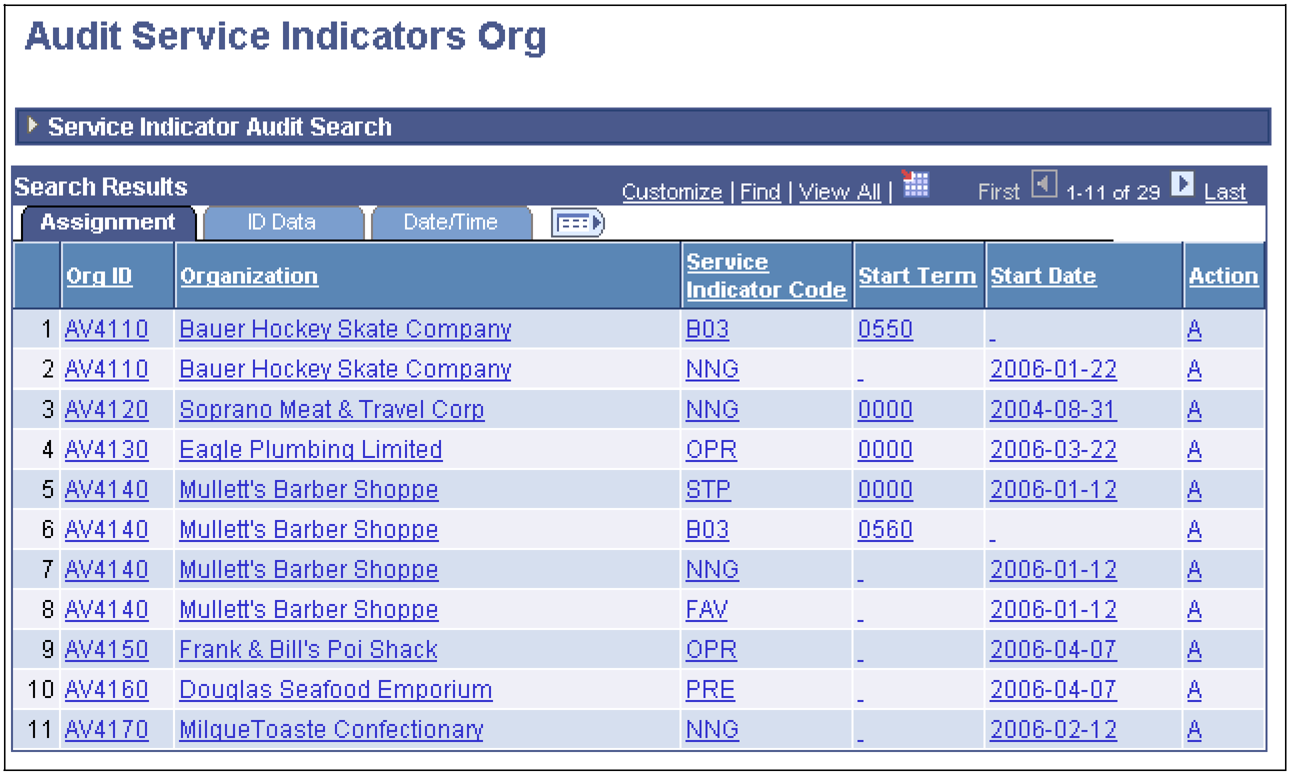
Search Results Customize | Find | View All | First 1-6 of 6 Last

Assignment | ID Data | Date/Time

	ID	Name	Service Indicator Code	Start Term	Start Date	Action
1	AA0007	Hill,Tracy	L01	_	2006-01-22	A
2	CC0003	Dam,Jan van	L01	_	2006-03-10	A
3	CC0026	Patterson,Suzanne	L01	_	2006-01-12	A
4	CC0033	Jackson,Nelson	L01	_	2006-02-12	A
5	CC0034	Jackson,Tonya	L01	_	2006-03-22	A
6	CC0036	Truelove,Elizabeth	L01	_	2006-04-07	A

Example of search results on the Service Indicator Audits page

This example shows an Audit Service Indicators Org page:


Audit Service Indicators Org

Service Indicator Audit Search

Search Results | Customize | Find | View All | First 1-11 of 29 Last

Assignment | ID Data | Date/Time

	Org ID	Organization	Service Indicator Code	Start Term	Start Date	Action
1	AV4110	Bauer Hockey Skate Company	B03	0550	_	A
2	AV4110	Bauer Hockey Skate Company	NNG	_	2006-01-22	A
3	AV4120	Soprano Meat & Travel Corp	NNG	0000	2004-08-31	A
4	AV4130	Eagle Plumbing Limited	OPR	0000	2006-03-22	A
5	AV4140	Mullett's Barber Shoppe	STP	0000	2006-01-12	A
6	AV4140	Mullett's Barber Shoppe	B03	0560	_	A
7	AV4140	Mullett's Barber Shoppe	NNG	_	2006-01-12	A
8	AV4140	Mullett's Barber Shoppe	FAV	_	2006-01-12	A
9	AV4150	Frank & Bill's Poi Shack	OPR	_	2006-04-07	A
10	AV4160	Douglas Seafood Emporium	PRE	_	2006-04-07	A
11	AV4170	MilqueToaste Confectionary	NNG	_	2006-02-12	A

Example of search results on the Audit Service Indicators Org page

Click any link in the results row to access the Service Indicator Audit page for that ID, where you can view details about the service indicator assignment.

Mass Assigning or Mass Releasing Service Indicators

This section discusses how to:

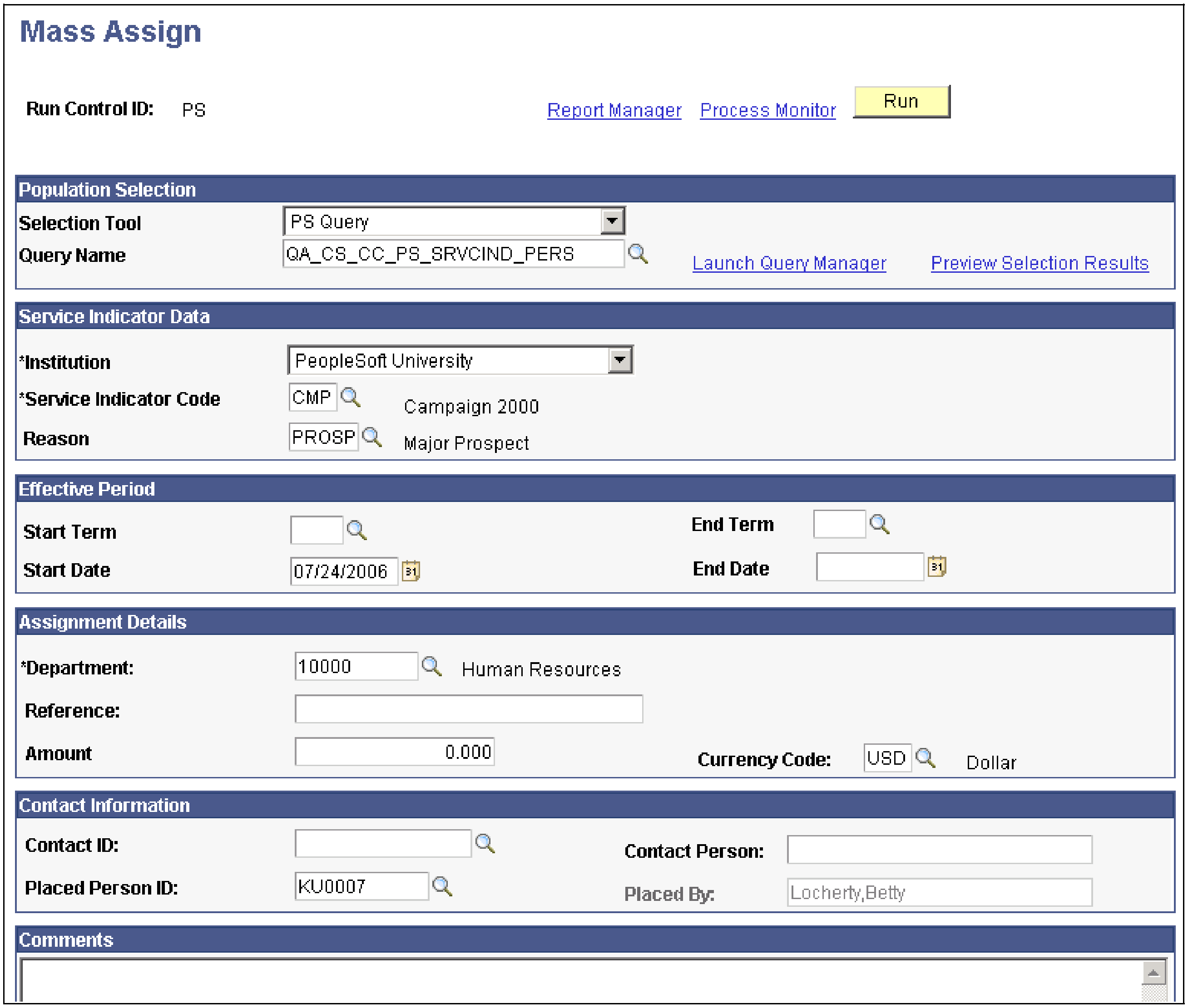
- Mass assign service indicators.
- Mass release service indicators.

Pages Used to Mass Assign or Mass Release Service Indicators

Page Name	*Definition Name*	*Navigation*	*Usage*
Mass Assign	SCC_SRVC_IND	• Campus Community, Service Indicators, Person, Mass Assign • Contributor Relations, Constituent Information, People, Service Indicators, Mass Assign	Assign a specific service indicator to several or many person IDs at the same time.
Mass Assign Org	SCC_SRVC_ORG	• Campus Community, Service Indicators, Organization, Mass Assign Org • Contributor Relations, Constituent Information, Organizations, Service Indicators, Mass Assign Org	Assign a specific service indicator to several or many organization IDs at the same time.
Mass Release	SCC_SI_RELEASE	• Campus Community, Service Indicators, Person, Mass Release • Contributor Relations, Constituent Information, People, Service Indicators, Mass Release	Release a specific service indicator from several or many person IDs at the same time.
Mass Release Org	SCC_SI_RELS_ORG	• Campus Community, Service Indicators, Organization, Mass Release • Contributor Relations, Constituent Information, Organizations, Service Indicators, Mass Release Org	Release a specific service indicator from several or many organization IDs at the same time.

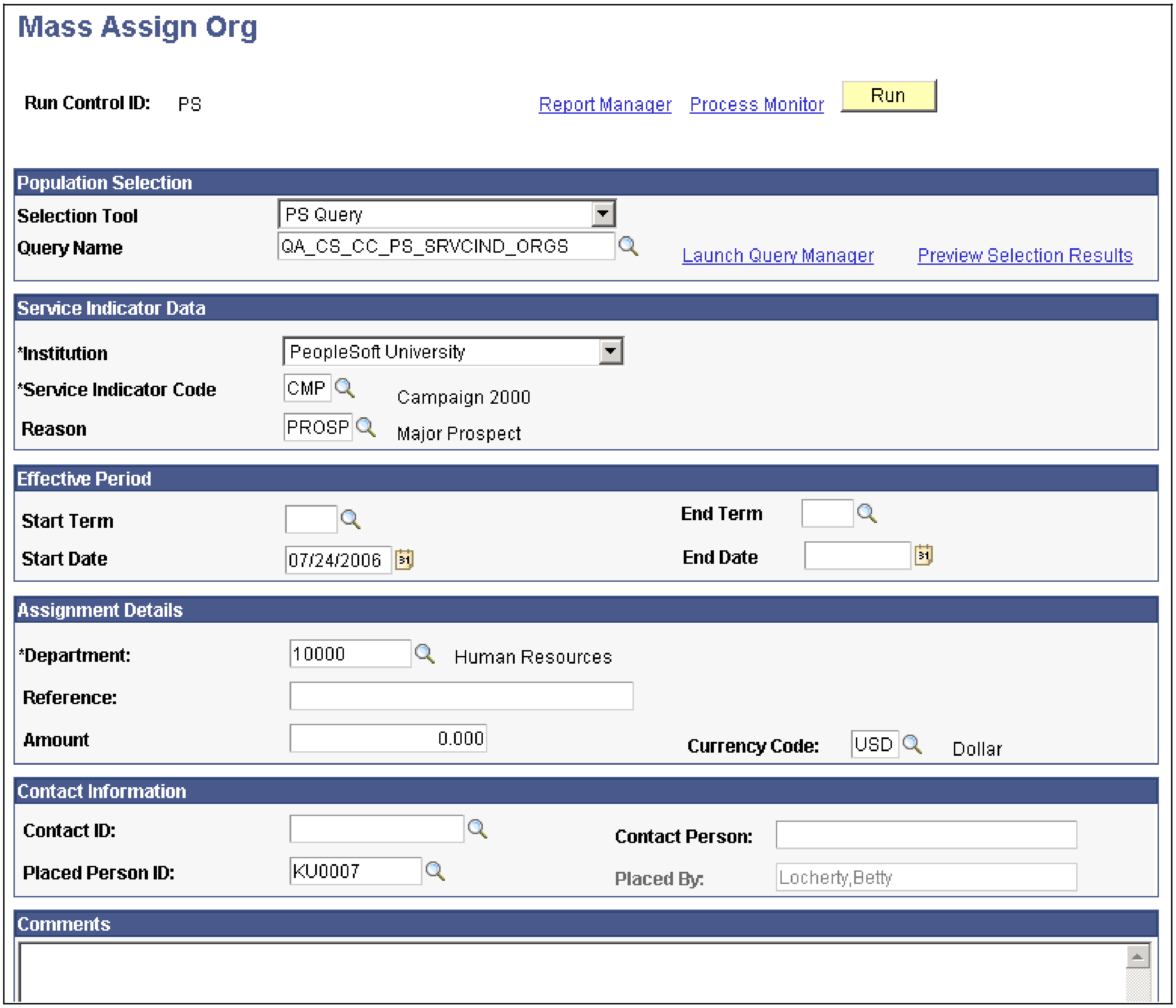
Mass Assigning Service Indicators

For individuals, access the Mass Assign page (Campus Community, Service Indicators, Person, Mass Assign).



Mass Assign page

For organizations, access the Mass Assign Org page (Campus Community, Service Indicators, Organization, Mass Assign Org).



Mass Assign Org page

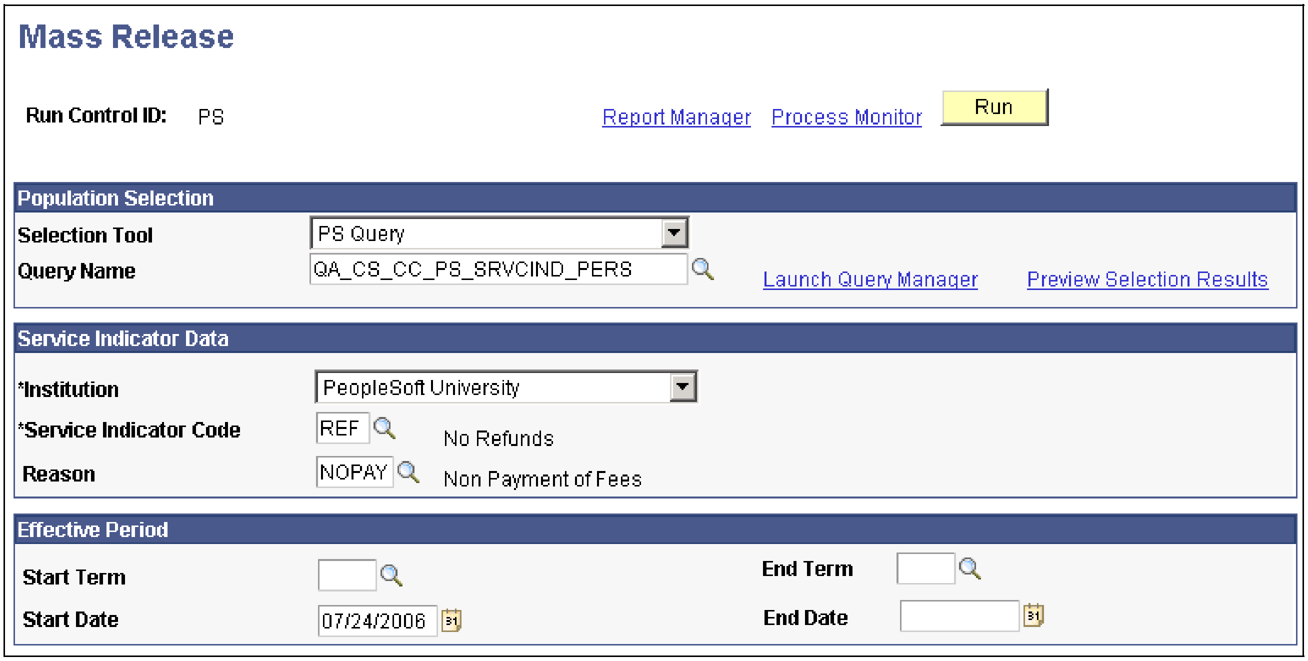
Select the tool that you want to use to assign the service indicator. Values are *Equation Engine*,*External File*, or *PS Query*.

Enter data to identify the service indicator to assign, just as you would on the Add Service Indicator page or the Add Service Indicator Org page.

When the Assign Service Indicators process runs (either SCC_SI_ASSN for individuals or SCC_ORG_ASSN for organizations), it assigns the specified service indicator to each ID in the selected population.

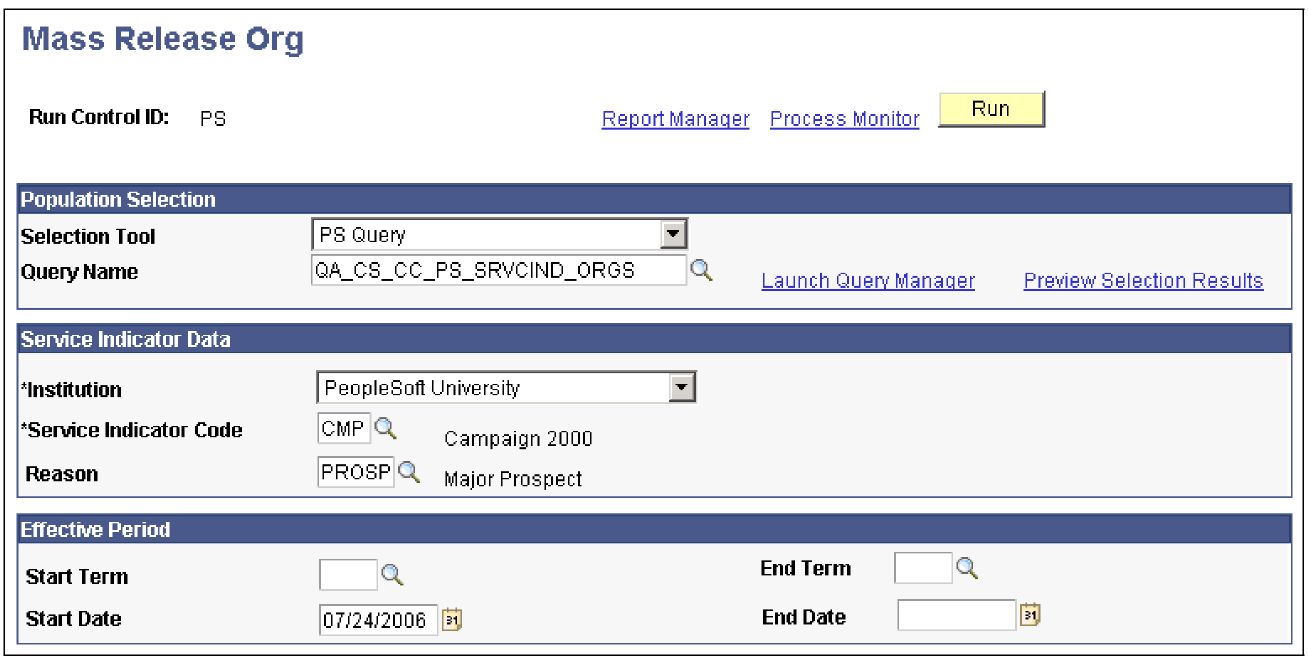
Mass Releasing Service Indicators

For individuals, access the Mass Release page (Campus Community, Service Indicators, Person, Mass Release).



Mass Release page

For organizations, access the Mass Release Org page (Campus Community, Service Indicators, Organization, Mass Release).



Mass Release Org page

Select the tool that you want to use to identify the population from which to release the service indicator . Values are *Equation Engine*, *External File*, or *PS Query*.

Enter or edit data to identify the service indicator to release, just as you would on the Edit Service Indicator page.

When the Service Indicator Release process runs (either SCC_SI_RELS for individuals or SCC_ORG_RELS for organizations), it will stop the service indicator from further validity for each ID in the selected population, and it will release the indicator from each ID record in the selected population. However, the service indicator assignment and release will remain part of the service indicator audit history.

Chapter 44

(USA) Managing PeopleSoft SEVIS Solution Visa Processing for J and F/M Visas

This chapter provides an overview of PeopleSoft SEVIS Solution visa processing and discusses how to:

- Create and update student or exchange visitor and dependent data.
- Track full course load exceptions for student F and M visas.
- Create and update student data for I-20 forms for F and M visas.
- Create and update exchange visitor data for DS-2019 forms for J visas.
- Use dependent search.
- Run the SEVIS Alerts process.
- View SEVIS Alerts process data.
- View event history information.
- Generate an XML file to send to SEVIS.
- Download and view SEVIS results.
- Extract external vendor data.

Understanding SEVIS Visa Processing

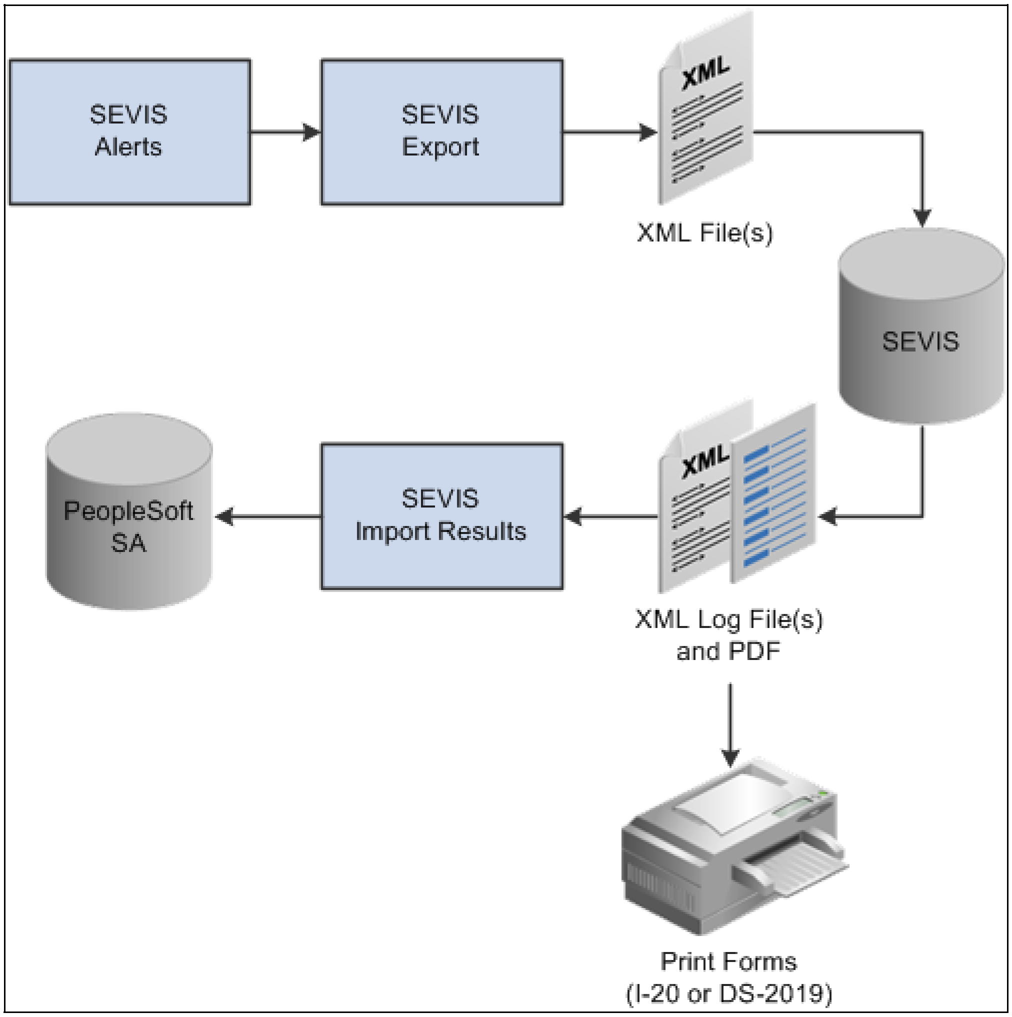
Student and Exchange Visitor Information System (SEVIS) is an internet-based system that electronically monitors and reports on international students and exchange visitors and their dependents. The U.S. Department of Homeland Security (DHS) maintains SEVIS. It is an integral part of the DHS program to improve data collection and reporting, facilitate compliance with regulations, and automate monitoring of school and exchange programs. The PeopleSoft SEVIS Solution collects data, monitors changes, and reports student and exchange visitor changes.

The PeopleSoft system extracts information and sends it to SEVIS to be reported to the DHS. You can audit the information after it is extracted. Once you are satisfied that it is correct, you can produce an XML file for transmission to SEVIS. The system verifies that the transmission was received, and it reports any errors. When you send changes to DHS, you receive an XML file from SEVIS that you use to import the results of the processing. You also receive PDF files containing any new I-20 or DS-2019 forms that are requested.

Understanding the Business Process Flow for Visa Processing

In this business process flow, it is assumed that you have completed the SEVIS setup in the PeopleSoft Campus Solutions system. This section discusses the PeopleSoft Campus Solutions-to-SEVIS batch interface functionality business process for student (F/M) visas and for exchange visitor (J) visas.

This flowchart illustrates the SEVIS visa processing business process. It shows the flow of the SEVIS alerts through to the XML log and SEVIS processor to the PeopleSoft database and printed I-20 or DS-2019 form.



PeopleSoft business process flow for SEVIS visa processing

Identify New and Changed Data to Submit to SEVIS

Follow these steps for identifying new and changed data to submit to SEVIS.

1. Run the SEVIS Alerts process.

   Run the appropriate SEVIS Alerts process (Process SEVIS Alerts - F/M or Process SEVIS Alerts - J). The process identifies information that should be submitted to SEVIS regarding new students (F/M visas) or exchange visitors (J visas) and data changes for existing students or exchange visitors. The process also verifies SEVIS business rules, required fields, and certain eligibility edits.

2. Use pages in the appropriate SEVIS Alerts component to evaluate the results of the SEVIS Alerts process.

   Use the Select Alerts to Report - F/M component to evaluate results for all applicable school codes, and use the Select Alerts to Report - J component to evaluate results for all applicable program sponsors.

   a. Review all information with errors and take appropriate follow-up action.

      Errors indicate transactional data that is missing or that needs to be changed before submission to SEVIS. You can update the SEVIS Master component if errors exist.

   b. Review all information requiring additional data.

      Certain SEVIS events require you to enter additional data.

   c. Review all data set to send to SEVIS on the Alerts Header page.

      The SEVIS Alerts process sets the Send to field to *SEVIS* based on the default value that is set on the SEVIS Event Types page, and includes the event in the XML file to send to SEVIS. If you do not want to include it in the XML file, change the Send to field to either *Master* or *None.*

   d. Select either *Master* or *None* for each remaining event.

      Select *Master* (Master Sync) to directly update the SEVIS Master component with the data for the event without including it in the XML file. Select *None* to prevent an event from processing until you can review it.

   e. Save your changes to the Alerts Header page in the Select Alerts to Report component (Select Alerts to Report - F/M or Select Alerts to Report - J).

Export Data to SEVIS Master or to the XML File to Send to SEVIS

Run the SEVIS Export process for the appropriate visa type (Export SEVIS Events - F/M or Export SEVIS Events - J).

For events where the Send To field is set to *Master* on the Alerts Header page, the export process directly updates the active SEVIS Master row with the data from the event.

For events where the Send To field is set to *SEVIS,* the export process generates an XML file compliant with the SEVIS XML schema. The process creates multiple XML files if the number of records transmitted to SEVIS exceeds 100. The export process also populates the SEVIS Master component with an inactive row containing the data sent to SEVIS.

Upload XML Batch Documents to SEVIS

To upload the generated XML files to SEVIS, you must use a utility that supports secure sockets layer (SSL) and HTTPS. The XML batch document upload process is completed outside the PeopleSoft Campus Solutions system using the utility program of your choice. Consult the U.S. Immigrations and Customs Enforcement (ICE) web site for information regarding digital certificate registration and batch file transmission.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Import the upload results transaction log using the SEVIS Import Results process.

Download XML Transaction Log and PDF Files from SEVIS

To download the XML transaction log files and any form PDF files (I-20 forms or DS-2019 forms) generated by SEVIS, you must use a utility that supports SSL and HTTPS. The XML transaction log and PDF files are compressed into a single file in zip format. You print the PDF files outside the PeopleSoft system.

Consult the U.S. Immigrations and Customs Enforcement (ICE) web site for information regarding retrieval and unzipping of the XML transaction log and PDF files.

Note. Carefully evaluate the *Application Program Interface (API)* to determine the period during which the batch process results remain available. The DHS SEVIS system automatically deletes files that are not downloaded within the specified period.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Import the XML Transaction Log Results

After the compressed batch result file is successfully downloaded and unzipped, import the XML transaction log result files into the PeopleSoft Campus Solutions system using the SEVIS Import Results process.

Run the SEVIS Import Results process for all applicable result files. Evaluate the transaction log results using the SEVIS Import Results pages. Review all transactions with errors and take appropriate follow-up action.

The import process also updates the SEVIS Master component to reflect the data successfully imported to SEVIS and populates the SEVIS ID Maintenance page with the SEVIS IDs for any new students or exchange students and their dependents.

Note. You must resolve eligibility errors returned by SEVIS before the next run of the SEVIS Alerts process. Allow enough time between reviewing the SEVIS XML transaction log results and running the process again so that you can modify student or exchange visitor and dependents transactional data to correct any errors.

Understanding the SEVIS Master Component

When you run the SEVIS Export process (Export SEVIS Events - F/M process or Export SEVIS Events - J process), all of the data that you export for submission to SEVIS is stored on pages in the SEVIS Master component (Campus Community, SEVIS, SEVIS Maintenance, SEVIS Master). The SEVIS Alerts process (Process SEVIS Alerts - F/M or Process SEVIS Alerts - J) compares the master data to the ongoing SEVIS data to detect updates to the student or exchange visitor and dependent data that should be subsequently submitted to SEVIS.

Warning! Do *not* manually update data on any of the SEVIS Master component pages unless you have made changes directly in the DHS SEVIS Real Time Interface (RTI) that cannot be processed using the Send to Master feature on the Alerts Header page. The data on the SEVIS Master component pages should always match the data on the RTI.

If the Education Level – Change event has been sent, two active rows are permitted on the Program and Financial tabs. Otherwise, each tab should have only one active status row. Update existing active rows. Do not manually add new rows.

Data in the SEVIS Master component is populated by either the SEVIS Extract Process (CCSEVEXT) or the SEVIS Master Sync Process (CCSEVSYF), both of which are part of the Export SEVIS Events process.

Send To SEVIS

If the Send To field on the Alerts Header page is set to *SEVIS* for an event, the system populates the SEVIS Master component when running the SEVIS Export process (Export SEVIS Events - F/M or Export SEVIS Events - J). The data varies by event. The effective status of each record is set to *Inactive* until the SEVIS Import Results process runs.

When the Create event (Create Student or Create EV) event is successfully imported to SEVIS and the SEVIS Import process runs, the SEVIS Master component inactive rows are set to *Active*. If the Create event has errors, the system deletes the SEVIS Master component inactive rows. View the errors on the SEVIS Import Results inquiry page and determine how to correct them before running the SEVIS Alerts process for the relevant visa type again. The Create event appears on the Alerts Header page again when the SEVIS Alerts process runs for that visa type.

When the Update events are processed, an inactive effective status row is added to the appropriate record in the SEVIS Master component. If the event is successfully imported to SEVIS, the data sent to SEVIS is updated on the active effective status row in the SEVIS Master component and the inactive rows are deleted. If the Update event has errors, the inactive rows are deleted in the SEVIS Master component. View the errors on the SEVIS Import Results inquiry page and determine how to correct them before running the SEVIS Alerts process for the relevant visa type again. The Update event appears on the Alerts Header page again when the SEVIS Alerts process runs for that visa type.

The SEVIS Import process for F/M visas also updates the SEVIS status when the following events are successfully processed by SEVIS:

- Registration (Sets SEVIS Status to *Active*).
- Status – Cancel (Sets SEVIS Status to *Cancelled*).
- Status – Terminate (Sets SEVIS Status to *Terminated*).
- Status – Complete (Sets SEVIS Status to *Complete*).

The SEVIS Import process for J visas also updates the SEVIS status when the following events are successfully processed by SEVIS:

- Create EV (Sets SEVIS Status to *Initial*).
- Validate (Sets SEVIS Status to *Active*).
- Status – No Show (Sets SEVIS Status to *No Show*).
- Status – Terminate (Sets SEVIS Status to *Terminated*).
- Status – End (Sets SEVIS Status to *Inactive*).
- Status – Invalid (Sets SEVIS Status to *Invalid*).

Send To Master (Master Sync)

If the Send To field on the Alerts Header page is set to *Master*, the system populates the SEVIS Master component when the SEVIS Export process (SEVIS Master Sync – F/M or SEVIS Master Sync – J) runs. The data varies by event.

When the Create event (Create Student or Create EV) is processed using Master Sync, new active effective status rows are created for the Bio/Demo, Addresses, Program, Financial, Dependents (if any) and Employment/SOA (J Visa only) pages in the SEVIS Master component. SEVIS Status on the Program page is set to *Initial*.

Warning! You must, on the SEVIS ID Maintenance page, manually enter the IDs assigned by SEVIS to the student and their dependents for F/M visas or to the exchange visitor and their dependents for J visas. If the SEVIS IDs are not added, when you process the Update events, errors are detected and indicated in the Select Alerts to Report component (Select Alerts to Report - F/M or Select Alerts to Report - J).

When you process the Update events using Master Sync, data from the event is inserted into the appropriate effective status active row in the SEVIS Master component. The existing data on the active row is overwritten with the new data from the event. The data varies by event. In addition, SEVIS Status is updated if the event causes an update.

Creating and Updating Student or Exchange Visitor and Dependent Data

This section discusses how to:

- Create and update biographical data.
- Create and update addresses data.
- Create and update electronic addresses.
- Create and update visa and permit data.
- Create and update port of entry information for F and M visas.
- Create and update citizenship and passport data.
- Maintain SEVIS ID information.
- Create and update employment authorization information for F and M visas.

Pages Used to Create and Update Student or Exchange Visitor and Dependent Data

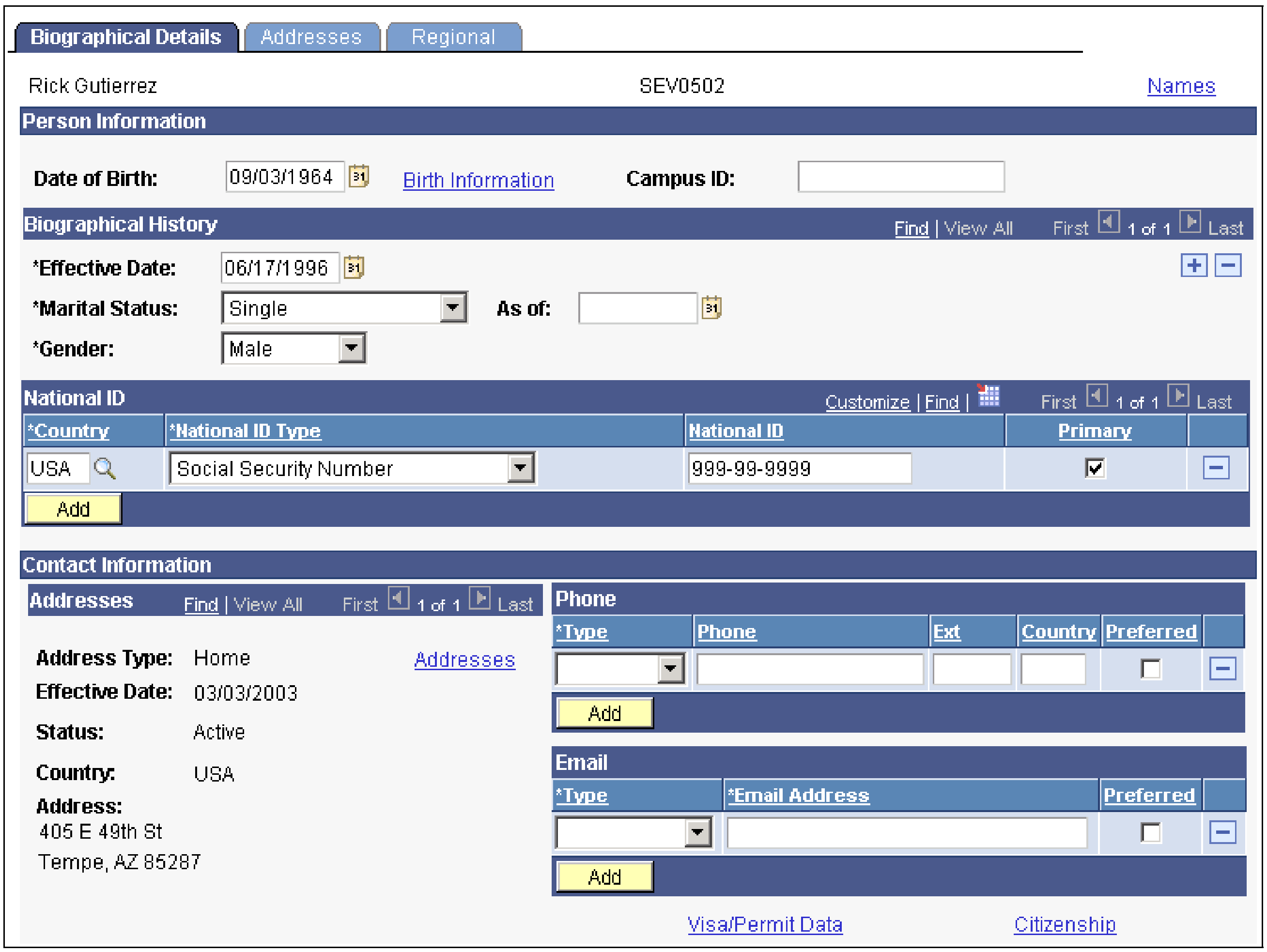
Page Name	***Definition Name***	***Navigation***	***Usage***
Biographical Details	SCC_BIO_DEMO_PERS	Campus Community, SEVIS, Personal Information, Add/Update a Person, Biographical Details	Enter or update basic biographical and demographic data for an individual.

Page Name	***Definition Name***	***Navigation***	***Usage***
Addresses	SCC_BIO_DEMO_ADDR	Campus Community, SEVIS, Personal Information, Add/Update a Person, Addresses	Update an individual's address information. **Note.** This pages does not appear in the Add/Update a Person component when you add a new person. It appears only when you update an existing person.
Addresses	ADDRESSES_89	Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses	Enter or update an individual's address information.
Electronic Addresses	E_ADDR_PERS	Campus Community, Personal Information, Biographical, Addresses/Phones, Electronic Addresses	Enter or update an individual's email address data.
Visa/Permit Data	SCC_VISA_PERMIT	Campus Community, SEVIS, Personal Information, Visa/Permit Data	Enter an individual's visa and permit information for SEVIS.
Visa/Permit Data Detail	VISA_PERMIT_DETAIL	Click the Visa/Permit link on the Biographical Details page.	Enter an individual's visa and permit information for SEVIS.
Citizenship/Passport Data	LS_CITIZEN_PASSPORT	Campus Community, SEVIS, Personal Information, Citizenship/Passport Data	Enter or update an individual's citizenship and passport data.
Citizenship Detail	SA_CITIZENSHIP_DTL	Click the Citizenship link on the Biographical Details page.	Enter or update an individual's citizenship and passport data.
SEVIS ID Maintenance	SEV_ID_MAINT	Campus Community, SEVIS, SEVIS Maintenance, SEVIS ID Maintenance	Enter or update an individual's SEVIS ID information.
Port of Entry Data	SEV_POE_DATA	Campus Community, SEVIS, Personal Information, Visa/Permit Data, Port of Entry Data	Track an individual's port of entry into the United States for F or M student visas.

Page Name	*Definition Name*	*Navigation*	*Usage*
Employment Authorizations	SEV_EMPL_AUTH	Campus Community, SEVIS, Employment Authorizations	Enter or update an individual's employment authorization information for F or M student visas.
SEVIS Employer Address	SEV_EMPL_ADDR	Click the Employer Address link on the Employee Authorization page.	Enter or update employer address information for F or M student visas.

Creating and Updating Biographical Data

Access the Biographical Details page (Campus Community, SEVIS, Personal Information, Add/Update a Person, Biographical Details).



Biographical Details

The Biographical Details page in the SEVIS Add/Update component is the same as the Biographical Details page in the Personal Information, Add/Update component.

SEVIS requires specific biographical data for each student and dependent. The SEVIS Export process pulls the required data from the Biographical Details page.

In addition to first and last names, the following fields must be completed for each student or exchange visitor and dependent:

Person Information

Last Name Enter the individual's last name.

Date of Birth Enter the individual's date of birth.

Birth Information (link) SEVIS requires that you enter the name of the individual's birth city (J Visa only) and country.

Click the Birth Information link next to the Date of Birth field to enter the individual's birth city and country.

Biographical History

Gender Specify the individual's gender. Options are *Male,Female,* or *Unknown.*

(Links at Bottom)

Visa/Permit Data SEVIS requires that you identify the type of visa issued to the individual.

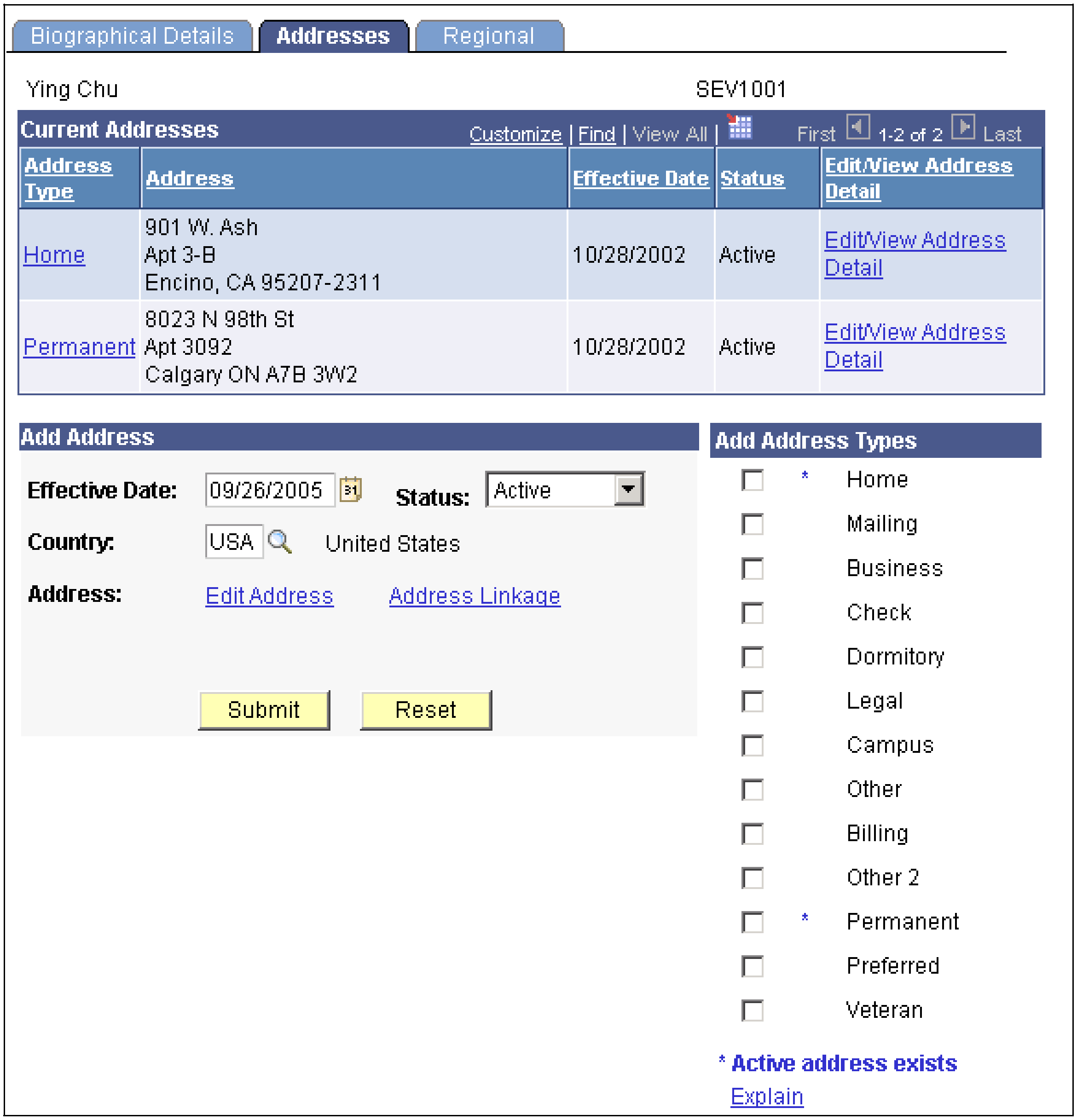
Click the Visa/Permit Data link to enter the visa type.

Citizenship SEVIS requires that you identify the individual's country of citizenship.

Click the Citizenship link to the enter the country of citizenship.

Creating and Updating Addresses Data

Access the Addresses page (Campus Community, SEVIS, Personal Information, Add/Update a Person, Addresses).



Addresses page

Note. The Addresses page does not appear in the Add/Update a Person component (shown here) when you add a new person. It appears only when you update an existing person.

Note. The PeopleSoft system stores up to the ninth digit of the U.S. postal code in the SEVIS Master component to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in the SEVIS Master component. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run the export and alerts processes, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the process ignores everything after the ninth digit.

For F and M student visas, SEVIS requires a foreign address for each student with a creation reason of *Initial* or *Initial - Change of Status* on the I-20 form.

For exchange visitor J visas, SEVIS requires that each exchange visitor have a U.S. address. If the exchange visitor does not have a U.S. address, the system uses the program sponsor's address from the Program Sponsor table to populate required fields for the Create EV event.

The address types reported to SEVIS are based on the types defined in the US and Foreign fields on the SEVIS Setup page. You can view address data on the Biographical Details page, and edit the data on the Addresses page.

The following fields are required for the foreign address:

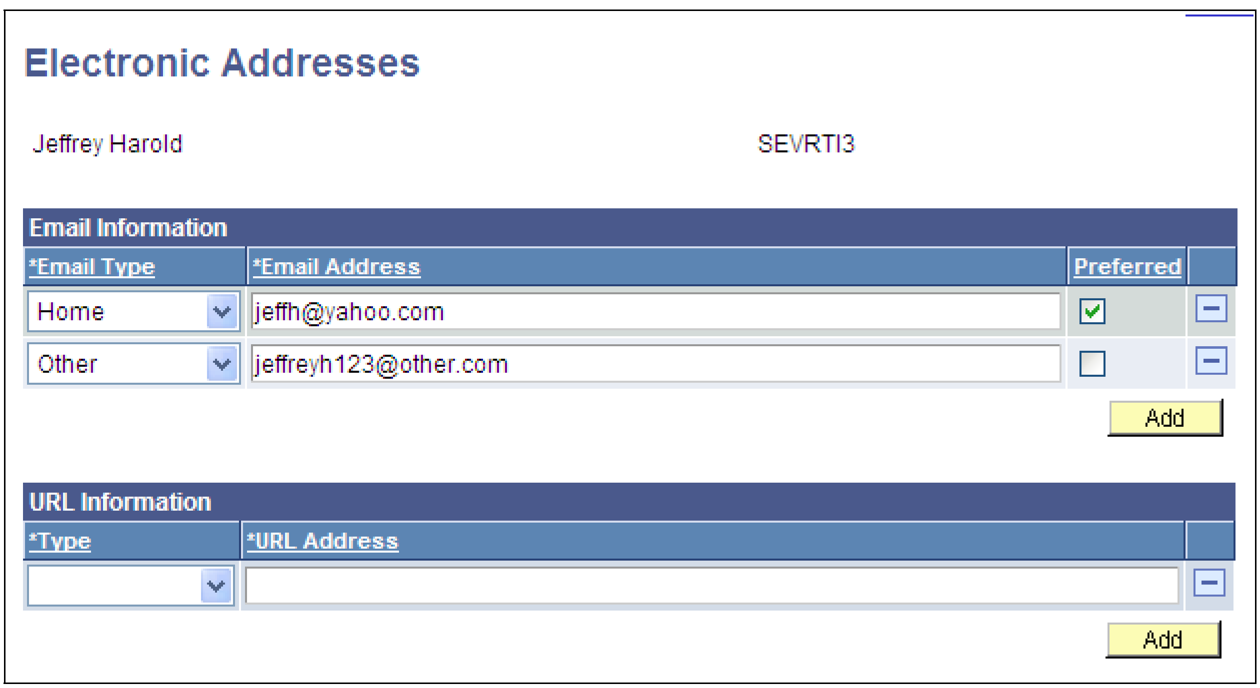
- Country
- Address 1

The following fields are required for the U.S. address:

- Address 1
- City
- State
- Postal

Creating and Updating Electronic Addresses

Access the Electronic Addresses page (Campus Community, Personal Information, Biographical, Addresses/Phones, Electronic Addresses).



Electronic Addresses page

Email Information

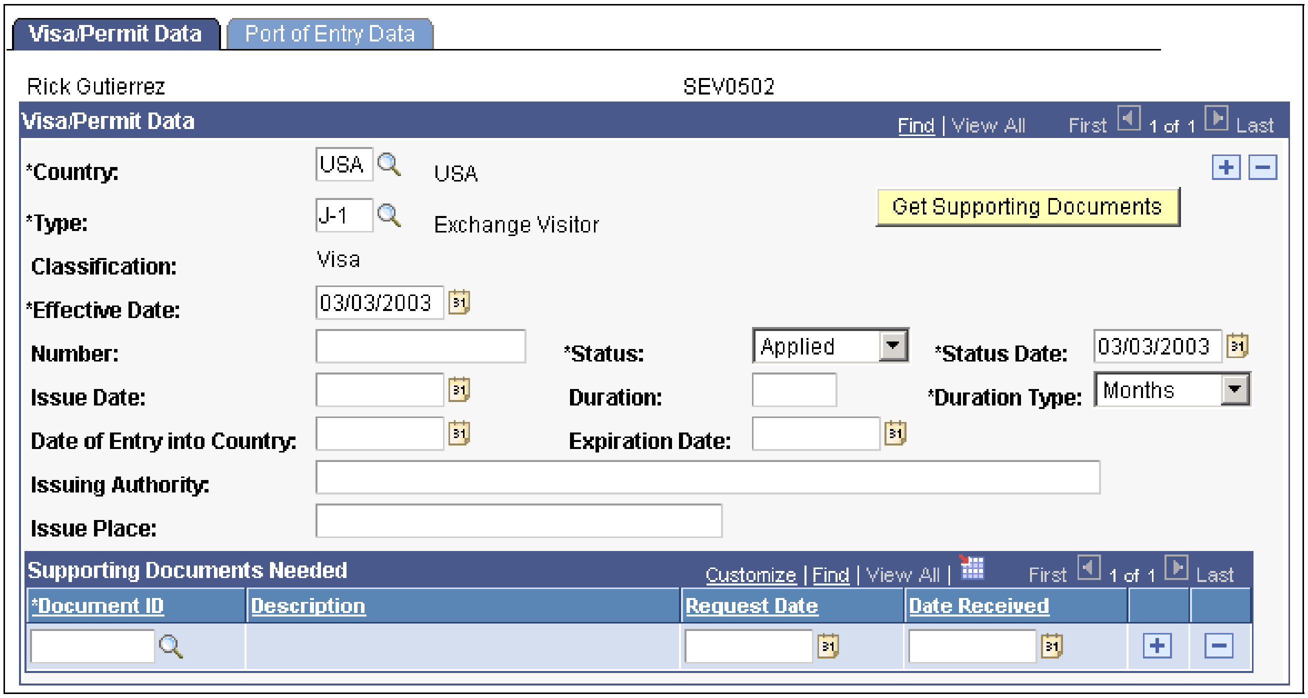
Enter the individual's email address. The email address that you select as Preferred is reported to SEVIS as part of the Create Student, Personal Info, Dependent – Add and Dependent – Edit events for F and M visas.

Email address is not required, but is reported when provided.

Note. The SEVIS Schema does not allow for sending a blank email address. If an alert is triggered due to an email address being removed, you will need to use SEVIS RTI to manually delete the email address.

Creating and Updating Visa and Permit Data

Access the Visa/Permit Data page (Campus Community, SEVIS, Personal Information, Visa/Permit Data).



Visa/Permit Data page

Visa/Permit Data

Type

Enter the type of visa issued to the individual.

For the PeopleSoft system to send the individual's information to SEVIS, the visa type that you enter must correspond to a visa type defined on the Visa Mapping page, which includes only *F*,*M*, or *J* visa types.

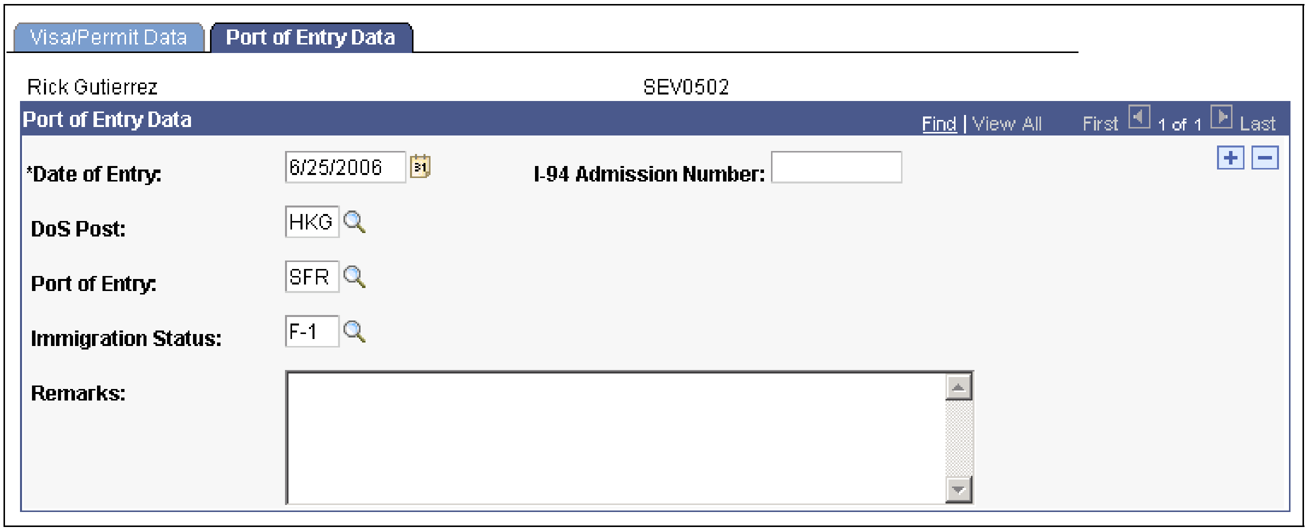
Number, Issue Date, and **Expiration Date**

Enter the visa number and appropriate dates.

This information is not required or reported.

Creating and Updating Port of Entry Information for F and M Visas

Access the Port of Entry Data page (Campus Community, SEVIS, Personal Information, Visa/Permit Data, Port of Entry Data).



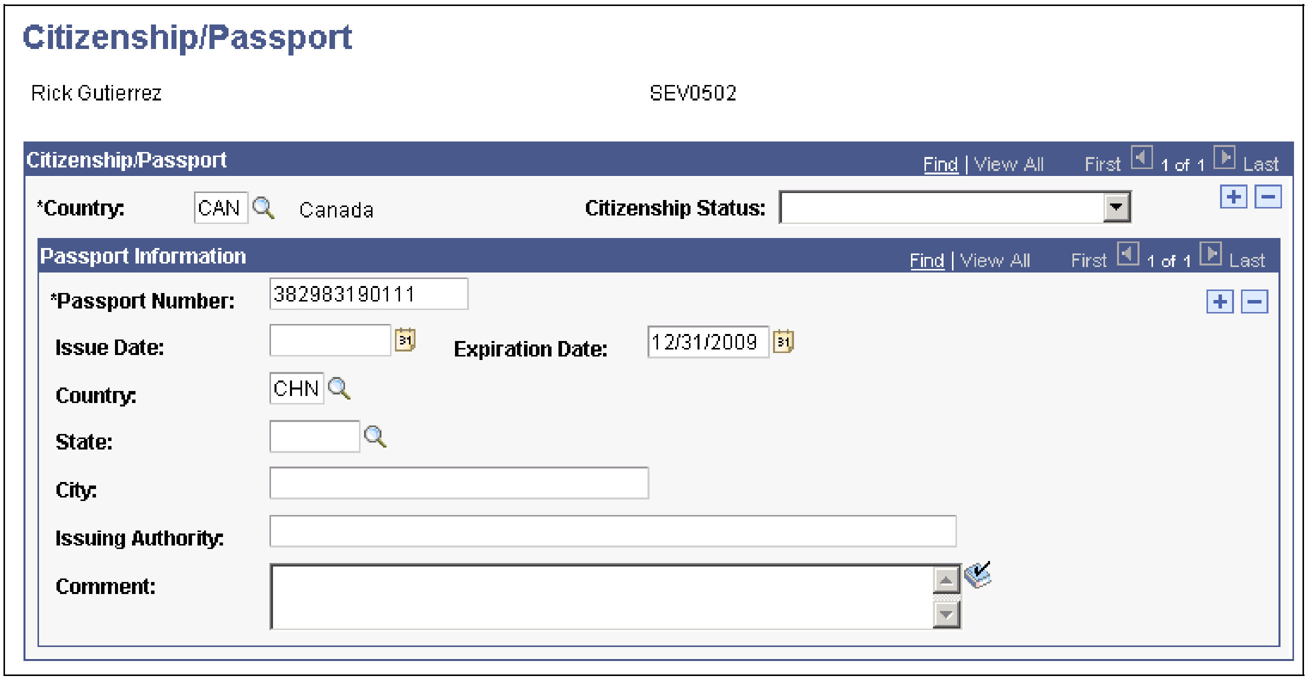
Port of Entry Data page

You can record data regarding a student's date and location of entry into the United States. The SEVIS system is the official record of this data, however, you might find it helpful to record this information in your PeopleSoft system.

Port of entry data is not required or reported.

Creating and Updating Citizenship and Passport Data

Access the Citizenship/Passport page (Campus Community, SEVIS, Personal Information, Citizenship/Passport Data).



Citizenship/Passport page

Citizenship/Passport

Country Enter the country of citizenship to use on the I-20 form or the DS-2019 form.

If you enter more than one non-U.S. country, you must indicate on the form which citizenship country to send to SEVIS.

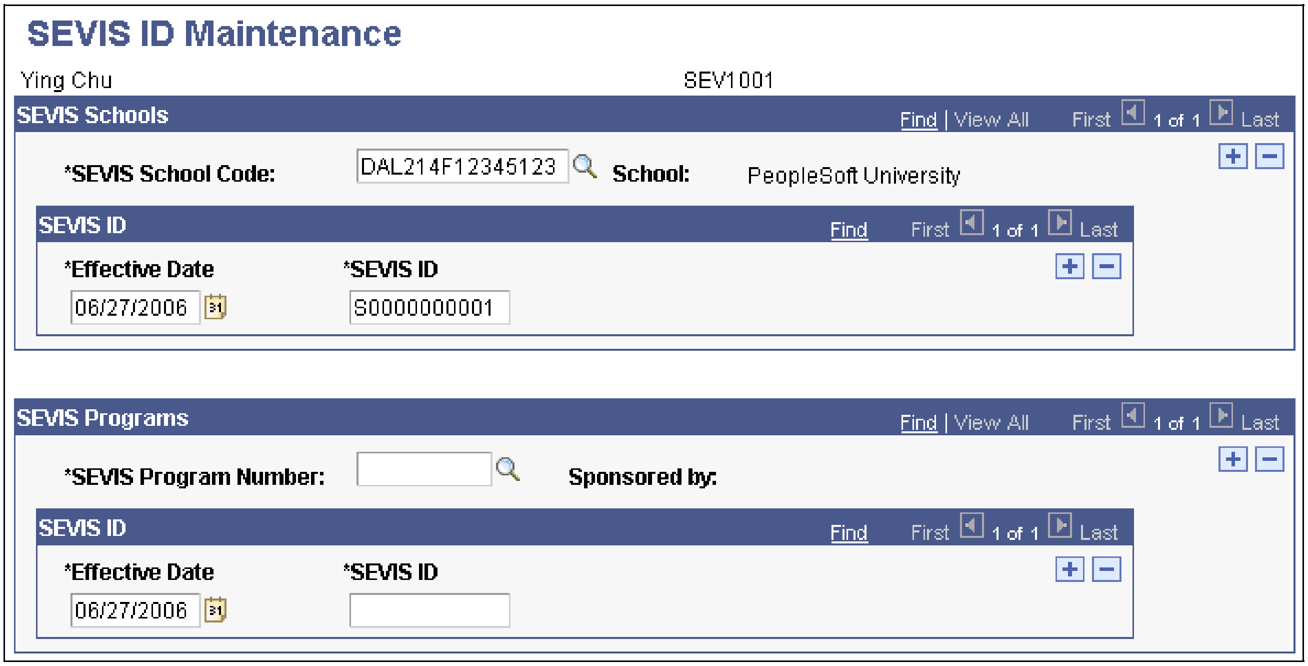
Passport Information

Passport Number, Issue Date, Expiration Date, and **Country** Enter the passport number and associated information.

This data is not required or reported.

Maintaining SEVIS ID Information

Access the SEVIS ID Maintenance page (Campus Community, SEVIS, SEVIS Maintenance, SEVIS ID Maintenance).



SEVIS ID Maintenance page

Note. When SEVIS processes the Create Student and Dependent - Add events for F/M visas or the Create EV and Dependent - Add events for J visas, it assigns SEVIS IDs to the new students or exchange visitors and dependents. You must manually enter the IDs assigned by SEVIS into your PeopleSoft system if you used the Send to Master option on the Alerts Header page to populate SEVIS Master for Create Student, Create EV or Dependent - Add events.

Use this page to store the SEVIS ID provided by the DHS for students or exchange visitors and their dependents. The SEVIS ID is an 11-character unique identifier that SEVIS uses for students and their dependents related to a specific school code and for exchange visitors and their dependents related to a specific program number. The system displays only the SEVIS IDs of the school codes or program numbers for which you have security clearance.

Running the SEVIS Import Results process for new students, exchange visitors, and dependents automatically populates the ID field. You may need to manually enter this value if you initially created the student or exchange visitor, or the dependent using the DHS SEVIS RTI.

SEVIS Schools for F and M Visas

SEVIS School Code,Effective Date, and **SEVIS ID**

Enter each school code for which the student has an I-20 form or is listed as a dependent on an I-20 form.

Enter the effective date of the SEVIS ID.

Enter the unique 11-digit identifier for the student or dependent for the SEVIS school code.

SEVIS Programs for J visas

SEVIS Program Number, Effective Date, and **SEVIS ID**

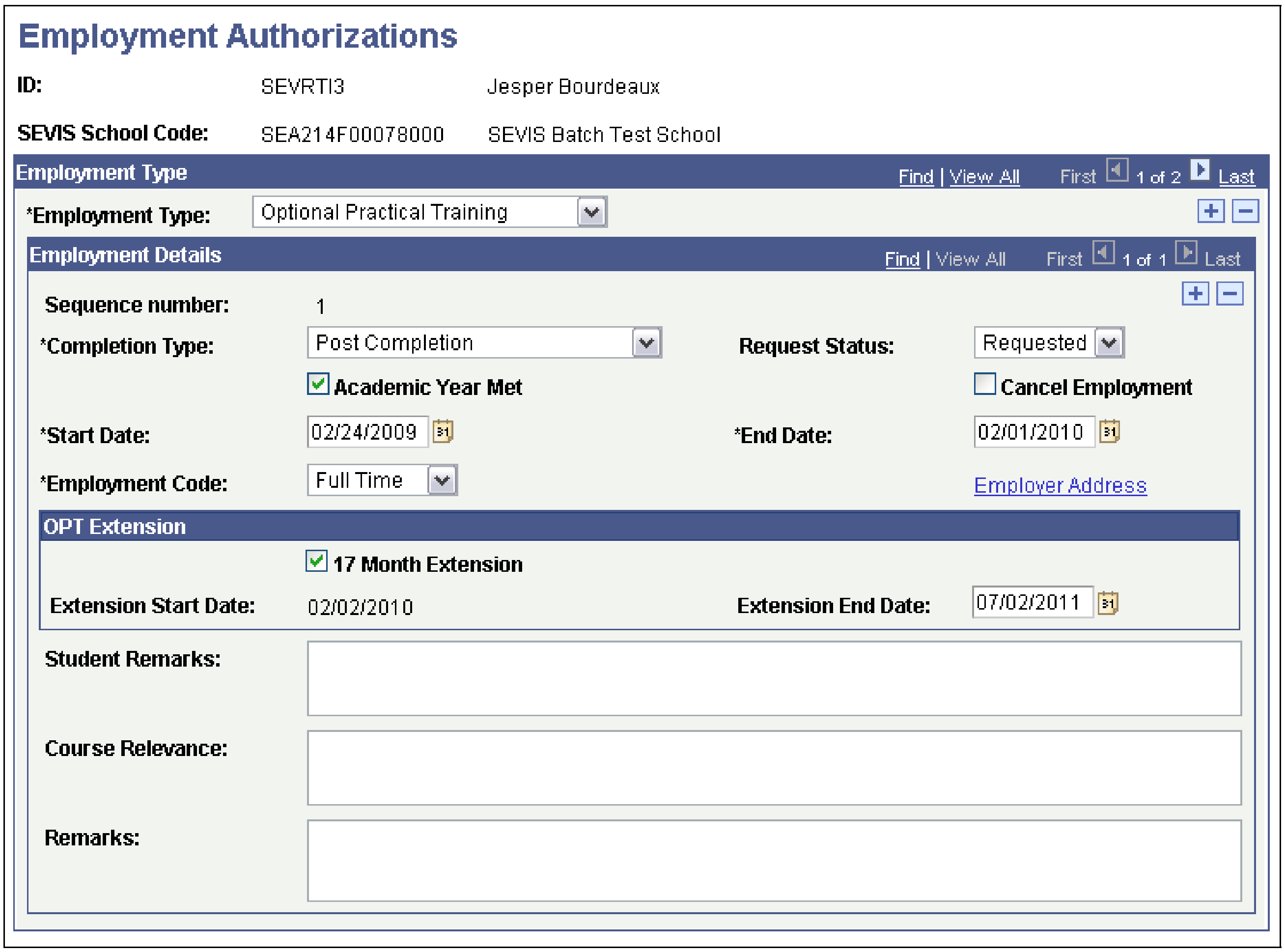
Enter each program number for which the exchange visitor has a DS-2019 form or is listed as a dependent on a DS-2019 form.

Enter the effective date of the SEVIS ID.

Enter the unique 11-digit identifier for the exchange student or dependent for the SEVIS school code.

Creating and Updating Employment Authorization Information for F and M Visas

Access the Employment Authorizations page (Campus Community, SEVIS, Employment Authorizations).



Employment Authorizations page

Employment Type

Employment Type

Select the employment type relevant to the authorization or endorsement for this student.

Options are:

Curricular Practical Training (CPT)

Optional Practical Training (OPT)

Off-Campus (to enter recommendation information for the student to obtain off-campus employment authorization)

M-1 students are authorized for OPT only. The system does not enable you to enter CPT or off-campus employment for an M-1 student.

F-1 students are eligible for all employment authorizations.

Note. The fields in the Employment Details group box remain the same for CPT and OPT. The system displays different fields when you enter the *Off-Campus* employment type.

Employment Details (for CPT and OPT employment types)

Sequence Number

Displays the number that the system uses to track multiple rows.

Completion Type

This field appears only for the Employment Type of *Optional Practical Training* for F-1 visas.

Values are:

Pre Completion

Post Completion

Note. For *Pre Completion*, the OPT end date must be on or before the program end date. For *Post Completion*, the OPT start date must be on or after the program end date.

Request Status

This field appears for the Employment Types of *Optional Practical Training* (OPT) and *Off-Campus Employment.*

For OPT, the Request Status field value is used in combination with other values on the Employment Authorizations page to trigger the OPT Employment – Extend and OPT Employment – Edit events. For example, if the 17 Month Extension check box is selected and the Request Status is *Approved*, the Extend event is triggered.

Values are:

Requested

Pending

Approved

Canceled

Denied

Unknown

Withdrawn

The default value is *Requested.*

Note. For rows existing prior to SEVIS 6.0, the Request Field value is set to *Unknown* in the system. You must change the value for all current OPT students to trigger the appropriate event.

Note. Automatic status change updates are not sent as part of the SEVIS Batch process. You must manually update this field when the status changes.

Warning! For OPT, SEVIS accepts changes to the Start Date,End Date, Employment Code,Completion Type or Academic Year Met fields only when the Request Status field is set to *Requested* or *Pending.*

Academic Year Met

This check box appears for the Employment Type of *Optional Practical Training* (OPT).

Select to indicate that the student has met the full academic year requirement for OPT.

Cancel Employment

Select this check box to trigger the CPT Employment - Cancel or the OPT Employment - Cancel event.

The start date must be later than the current system date for CPT Employment.

Cancellation of OPT Employment may be performed only prior to determination of the OPT by the Service Center.

Start Date

Enter the date when the employment is expected to begin.

End Date

Enter the date when the employment is expected to end.

Note. Review DHS regulations to ensure that you comply with the most recent duration rules for the employment type before entering the authorization start and end date.

The Curricular Practical Training (CPT) employment type requires that the end date be not later than the end date for the student on the I-20 form.

See the U.S. Immigration and Customs Enforcement website for regulations regarding employment duration: http://www.ice.gov/sevis/schools/existing_schools/index.htm.

The authorization end date affects the Program – Complete event trigger.

Employment Code

Select either *Part-time* or *Full-time.*

17 Month Extension

This check box appears only for the Employment Type of *Optional Practical Training* for F-1 visas.

When selected, the employer's name and address are required.

The 17 Month Extension field value is used in combination with the Request Status value to trigger the OPT Employment – Extend event. For example, if the 17 Month Extension check box is selected and the Request Status is *Approved,* the Extend event is triggered.

Note. The SEVIS Batch process accepts only requests where Request Status is *Approved* and Completion Type is *Post Completion.* See the U.S. Immigration and Customs Enforcement website for regulations regarding eligibility for 17 month extensions: http://www.ice.gov/sevis/schools/existing_schools/index.htm

---

Extension Start Date

This field appears only for the Employment Type of *Optional Practical Training* (OPT) when the 17 Month Extension check box is selected.

The system automatically enters an Extension Start Date of OPT end date plus one day. You cannot edit this date.

The SEVIS Batch process does not send the Extension Start Date value to SEVIS.

Extension End Date

This field appears only for the Employment Typeof *Optional Practical Training* (OPT) when the 17 Month Extension is selected.

The system automatically enters an extension end date of the OPT extension start date plus 17 months.

You can edit this date, and might want to do so when a Cap-Gap extension is approved.

The SEVIS Batch process does not send the Extension End Date value to SEVIS.

Course Relevance

Enter remarks identifying the relevance of the employment to the student's course of study.

Remarks are not required, but are submitted if provided.

Student Remarks

This field appears only for the Employment Type of *Optional Practical Training* (OPT).

Student remarks are optional, but are submitted to SEVIS when provided.

Remarks

Remarks here are optional, but are submitted to SEVIS when provided.

Employer Address

Click to access the SEVIS Employer Address page, where you can enter employer name and address information.

If the employer is defined in the External Organization table, you can enter it on the SEVIS Employer Address page to populate the fields there (Employer Name,Address 1,Address 2,City,State, and Postal Code).

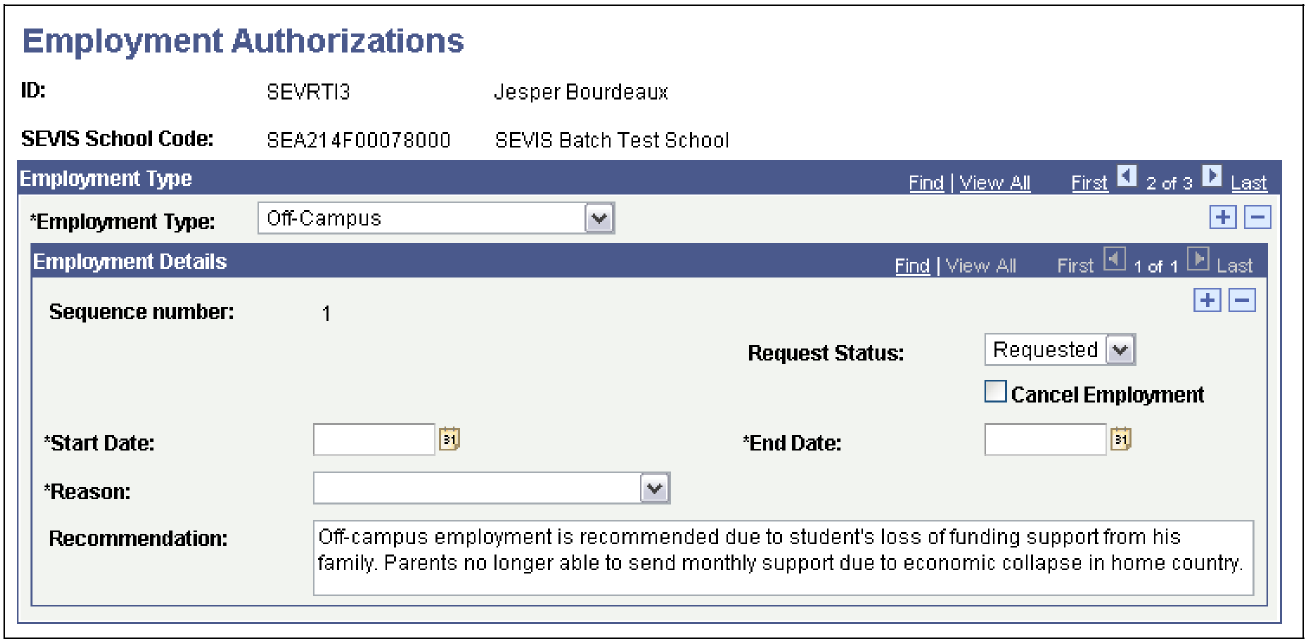
You can also manually enter employer name and address information on the SEVIS Employer Address page without using an external organization ID.

Note. SEVIS requires employer information for CPT authorizations, but it is optional for OPT endorsements.

Note. The PeopleSoft system stores up to the ninth digit of the U.S. postal code in the SEVIS Master component to enable you to store bulk mail codes on the Addresses page as part of the postal code without affecting SEVIS processing. The alerts process compares up to the ninth digit of the postal code on the addresses record against the postal code stored in the SEVIS Master component. If the postal code for a U.S. address is too short (1-4 digits or 6-8 digits) when you run alerts process, an error appears on the Alerts page saying that the postal code is invalid. If the postal code is too long (greater than 9 digits), the processes ignores everything after the ninth digit.

Employment Details (for Off-Campus Employment Type)

When you enter the employment type of *Off Campus,* the fields in the Employment Details group box change.



Employment Authorizations (Off-Campus Employment Type) page

Sequence Number

Displays the number that the system uses to track multiple rows.

Cancel Employment

Select to trigger the Off Campus Employment - Cancel event.

Start Date

Enter the date when the employment is expected to begin.

Note. To trigger the Off Campus Employment - Cancel event, the start date must be later than the current system date.

End Date

Enter the date when the employment is expected to end.

The date entered must be earlier than or equal to the I-20 Program To Date value.

Reason

The available options are *Economic Hardship*, *International Organization*, and *Special Student Relief.*

The DHS defines the reasons in the Student Off-Campus Employment Codes section of the Lookup Tables in the *Application Program Interface* on the U.S. Immigrations and Customs Enforcement (ICE) web site.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Request Status

This field appears only for the Employment Types of *Optional Practical Training* (OPT) and *Off Campus Employment.*

Values are:

Requested

Pending

Approved

Canceled

Denied

Unknown

Withdrawn

The default value is *Requested.*

Note. Automatic status change updates are not sent as part of he SEVIS Batch process. You must manually update this field when the status changes.

Recommendation

Enter general remarks regarding the student's off-campus employment.

Remarks are not required, but are submitted if provided.

Tracking Full Course Load Exceptions for F and M Visas

This section discusses how to:

- Track full course load exception rules.
- Track external full course load exceptions.
- Assign full course load exceptions in batch.

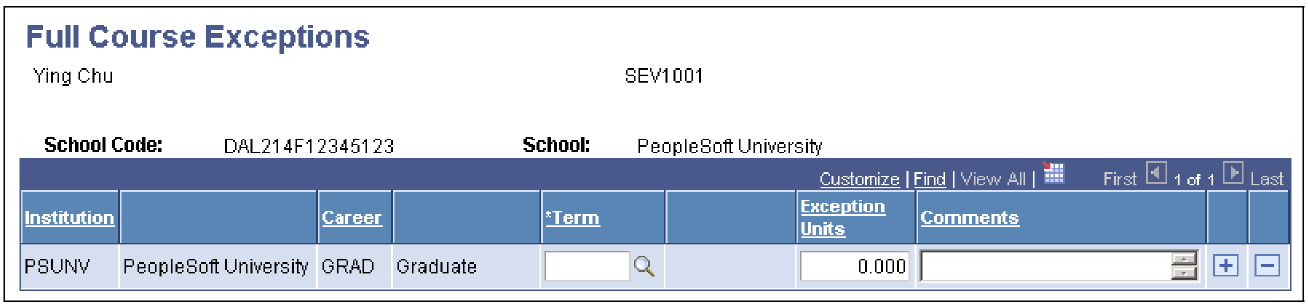
Pages Used to Track Full Course Load Exceptions for F and M Visas

Page Name	*Definition Name*	*Navigation*	*Usage*
Full Course Exceptions	SEV_FULCRS_EXCP	Campus Community, F/M Full Course Exceptions, Full Course Exceptions	Enter or update exceptions to the full course load for an individual with an F or M visa.

Page Name	Definition Name	Navigation	Usage
External Full Course Exception	SEV_FULCRS_EXCP2	Campus Community, SEVIS, F/M Full Course Exceptions, External Full Course Exception	Enter or update information for exceptions to the full course load for an individual with an F or M visa when using the External System Extract process.
Full Course Exception Load	RUNCTL_CCSEVFCE	Campus Community, SEVIS, F/M Full Course Exceptions, Full Course Exception Load	Process information for exceptions to the full course load by student group or job code for individuals with F or M visas.

Tracking Full Course Load Exception Rules

Access the Full Course Exceptions page (Campus Community, F/M Full Course Exceptions, Full Course Exceptions).



Full Course Exceptions page

You can specify exception units for students who are not enrolled for a full course of study as defined by the academic level and load rules. You can then track students who have your institution's permission to enroll in less than a full course of study. You are not required to submit to SEVIS the Auth Drop Below Full Course - Add event for those students. For example, a graduate assistant who, by institutional agreement and definition, enrolls for fewer units than typical graduate-level students, might not drop below full-time.

The SEVIS Alerts - F/M process evaluates data entered for students who are not enrolled full-time, but whose data is entered for the combination of institution, career, and term that the process uses.

The page displays the eligible institutions and careers in which the student is eligible to enroll. Enter multiple rows with the term and exception units for students who are granted exceptions that span multiple terms.

You can also use the Full Course Load Exception process to populate this page for large groups of students.

The system displays the student name, ID, school code, school, institution, and career.

Term Select the term value for which you are granting the student an exception.

The only terms available are those in which the student has been term-activated and in which the student is eligible to enroll.

Exception Units

Enter the full-time exception units that the student is granted.

The External System Extract process evaluates this value to determine the full course status populated in the extract XML file.

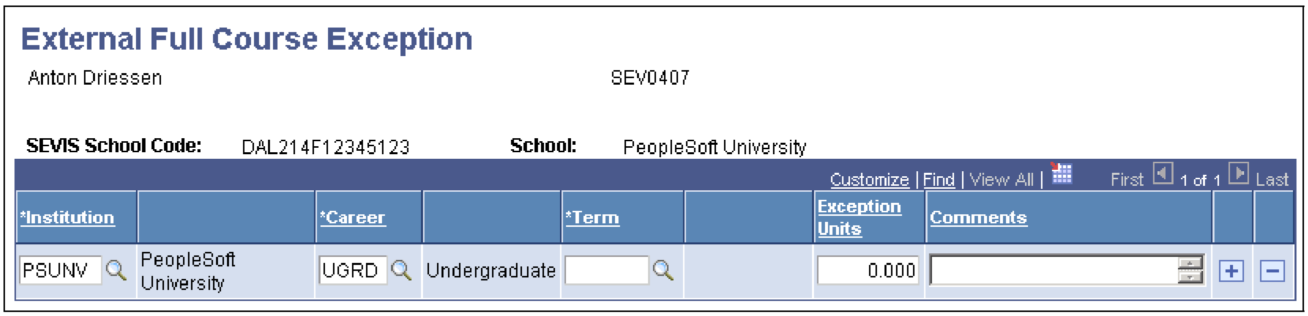
You can enter *0.000* for the exception units.

Comments

Enter comments if appropriate.

Tracking External Full Course Load Exceptions

Access the External Full Course Exception page (Campus Community, SEVIS, F/M Full Course Exceptions, External Full Course Exception).



External Full Course Exception

Anton Driessen SEV0407

SEVIS School Code: DAL214F12345123 School: PeopleSoft University

Customize | Find | View All | First 1 of 1 Last

*Institution		*Career		*Term		Exception Units	Comments
PSUNV	PeopleSoft University	UGRD	Undergraduate			0.000	

External Full Course Exception page

You can specify exception units for students who will not be enrolled for a full course of study as defined by the academic level and load rules. You can then track students who have your institution's permission to enroll in less than a full course of study. The exception entered here determines the full-time status populated in the External System Extract process.

The page displays the eligible institutions and careers in which the student is eligible to enroll. Enter multiple rows with the term and exception units for students granted exceptions that span multiple terms.

You can also use the Full Course Load Exception process to populate this page for large groups of students.

Institution and **Career**

Select the institution and career for which the student is term-activated.

Term

Select the term value for which you are granting the student an exception.

The only terms that appear are those in which the student is term-activated and in which the student is eligible to enroll.

Exception Units

Enter the exception units considered full-time that the student is granted.

The External System Extract process evaluates this value to determine the full course status populated in the extract XML file.

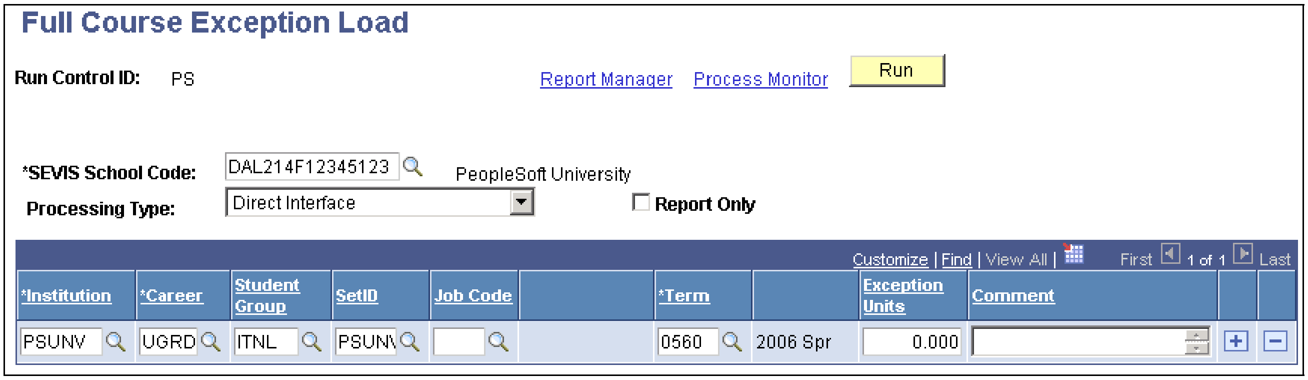
You can enter *0.000* for the exception units.

Comments

Enter comments if appropriate.

Assigning Full Course Load Exceptions in Batch

Access the Full Course Exception Load page (Campus Community, SEVIS, F/M Full Course Exceptions, Full Course Exception Load).



Full Course Exception Load page

The Full Course Exception Load page enables you to assign a full course exception for a group of students in either a specific student group or with a specific job code rather than adding an exception one student at a time.

You can use this process to populate the Full Course Exceptions page or the External Full Course Exception page depending on the processing type that you select. You can add multiple rows if you have more than one student group or job code from which you want to select students. If a student meets the criteria for more than one group, the process assigns the lowest Exception Units to the student.

SEVIS School Code

For the direct interface, select the school code from which to select the students.

For the External Extract process, select the school code that you want to use for each student granted the full course exception.

Processing Type

Select the appropriate option based on the process that your institution uses to report data to SEVIS. The options for processing type are *Direct Interface* and *External Extract Process.*

The *Direct Interface* option selects students with an F-1 or M-1 visa status who have an I-20 record for the selected school code and who are term-activated for the combination of institution, career, and term indicated, and who belong to either the student group or job code indicated.

The *External Extract Process* option selects students with an F-1 or M-1 status who are term-activated for the combination of institution, career, and term indicated and who belong to either the student group or job code indicated.

Report Only	Select to run the process to obtain a listing of the students selected without inserting the data into the student's record. This enables you to check the student population selected before the data is populated. Clearing the Report Only field allows the data to populate on the Full Course Exceptions page for the students selected.
Student Group	Select the appropriate student group.
SetID	Select the setID for the job code.
Job Code	Select the appropriate job code.
Term	Enter the term to appear on the Full Course Exceptions page or External Full Course Exception page.
Exception Units	Enter the exception units to appear on the Full Course Exceptions page or the External Full Course Exception page.
Comment	Enter a comment to appear on the Full Course Exceptions page or External Full Course Exception page.

When you run the External System Export process, the XML indicates the full-time status of the student by using the full course exception entered.

For example, suppose that a student is enrolled for nine hours and the level and load rules designated this a three-quarters time. A full course exception of nine hours is entered for the student, so the full-time status for the student is set to *Y* on the XML output, as shown in the following code sample. In addition, two fields are added to the XML output: the Full Course Override field and the Full Course Exception Units field.


```
<EducationalInfo>
 <FullTime>Y</FullTime>
- <AcademicData>
   <Institution>PSUNV</Institution>
   <InstitutionDescr>PeopleSoft University</InstitutionDescr>
   <Career>UGRD</Career>
   <CareerDescr>Undergraduate</CareerDescr>
   <SEVISSchoolCodeId>DAL214F12345123</SEVISSchoolCodeId>
   <AdmitTerm>0487</AdmitTerm>
   <AdmitTermDescr>2003 Spring</AdmitTermDescr>
   <EnrollTerm>0487</EnrollTerm>
   <EnrollTermDescr>2003 Spring</EnrollTermDescr>
   <PrimaryMajorCIPCode>42.0101</PrimaryMajorCIPCode>
   <PrimaryMajor>PSYCH</PrimaryMajor>
   <PrimaryMajorDescr>Psychology</PrimaryMajorDescr>
   <AcademicProgram>LAU</AcademicProgram>
   <AcademicProgramDescr>Liberal Arts Undergraduate</AcademicProgramDescr>
   <ProgramAction>ACTV</ProgramAction>
   <ProgramActionDescr>Activate</ProgramActionDescr>
   <ProgramStatus>AC</ProgramStatus>
   <ProgramStatusDescr>Active in Program</ProgramStatusDescr>
   <AcademicLoad>H</AcademicLoad>
   <AcademicLoadDescr>Enrolled Half-time</AcademicLoadDescr>
   <CourseUnits>9.000</CourseUnits>
   <FullCourseOverride>Y</FullCourseOverride>
   <FullCourseExceptionUnits>9.000</FullCourseExceptionUnits>
   <CurrentSessionEndDate>2003-05-15</CurrentSessionEndDate>
   <NextSessionStartDate>2003-08-27</NextSessionStartDate>
   <ExpectedGradTerm>0505</ExpectedGradTerm>
   <ExpectedGradTermDescr>2003 Fall</ExpectedGradTermDescr>
   <PrgStartDate>2003-01-20</PrgStartDate>
 </AcademicData>
```


Creating and Updating Student Data for I-20 Forms for F and M Visas

The I-20 form pages included in the PeopleSoft system display relevant I-20 form data in a sequence similar to the I-20 form document produced by SEVIS. The SEVIS system produces the actual I-20 form in PDF format using data provided by your institution.

The PeopleSoft system I-20 Form pages are keyed by the student's ID and school code. Access to the form is controlled through SEVIS school code security.

To decrease data entry time, use the I-20 template to populate default values for many of the fields on the I-20 form.

Note. The PeopleSoft system requires that any student for whom you are entering I-20 form data, must have an appropriate F-1 or M-1 visa type defined on the Visa/Permit Data page.

This section discusses how to create and update I-20 form data.

Pages Used to Create and Update Student Data for I-20 Forms for F and M Visas

Page Name	***Definition Name***	***Navigation***	***Usage***
I-20 Form	I20_FORM	Campus Community, SEVIS, I-20 Forms, I-20 Form	Create or update I-20 information.
Program Selection	SEV_I20_SEL_SEC	Click the Select Program Data link on the I-20 Form page.	Select an institution, career, and academic program combination.

Entering I-20 Form Data

Access the I-20 Form page (Campus Community, SEVIS, I-20 Forms, I-20 Form).

I-20 Form

Jesper Bourdeaux SEVRTI3

School Code: SEA214F00078000 SEVIS Batch Test School

SEVIS Status: Active

SEVIS ID: N0000111144

I-20 Form Details Find First 1 of 1 Last

*Effective Date: 11/25/2008 *Status: Active

Cancellation Reason:

Cap Gap Status:

Institution: PSUNV PeopleSoft University Select Program Data

Career: UGRD Undergraduate

Acad Prog: LAU Liberal Arts Undergraduate

Admit Term: 0504 Test - Current Term Sevis

Student Information

Family Name: Bourdeaux Middle Name: Michael

First Name: Jesper Date of Birth: 02/24/1986

Birth Country: CAN Canada Admission Nbr:

*Citizenship Country: CAN Canada

SEVIS Commuter Addresses

School Information

School Official: Nathan Prince Title: International Officer

Address 1: 15821 VENTURA BLVD

City: ENCINO

State: CA Postal: 91436 Approval Date: 01/01/2000

Student Creation Reason

Initial Creation

Initial - Change of Status

Continued Attendance

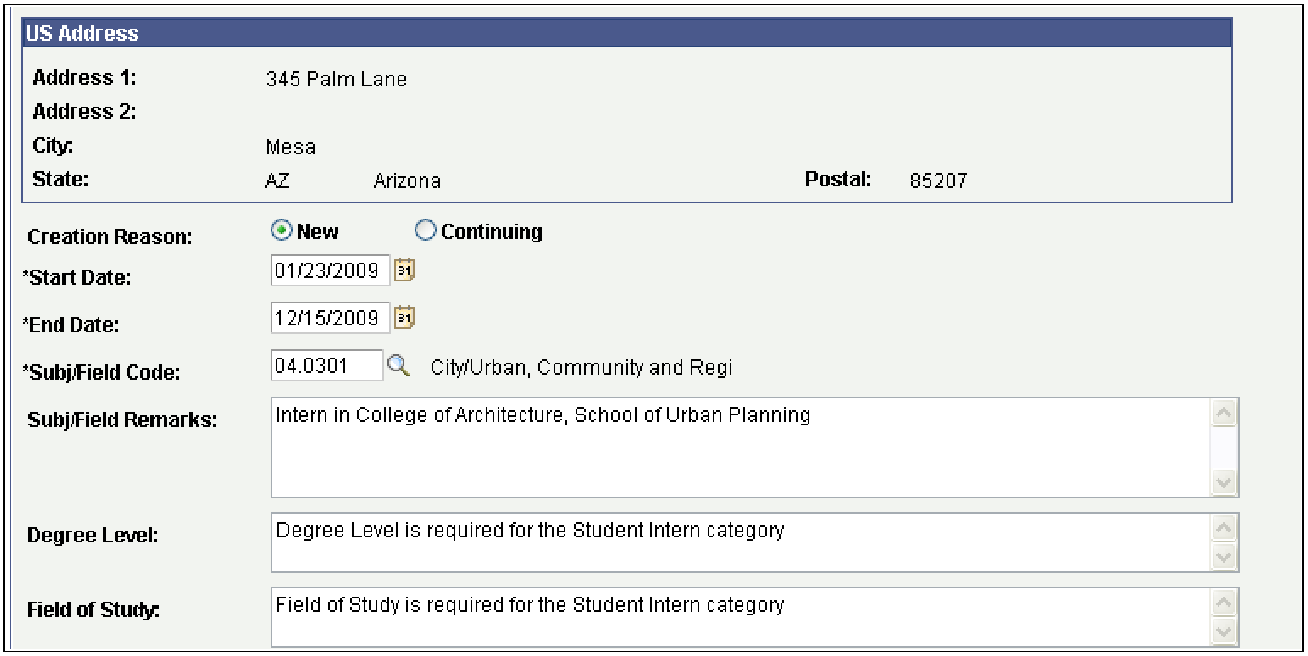
Reinstatement Request

School Transfer

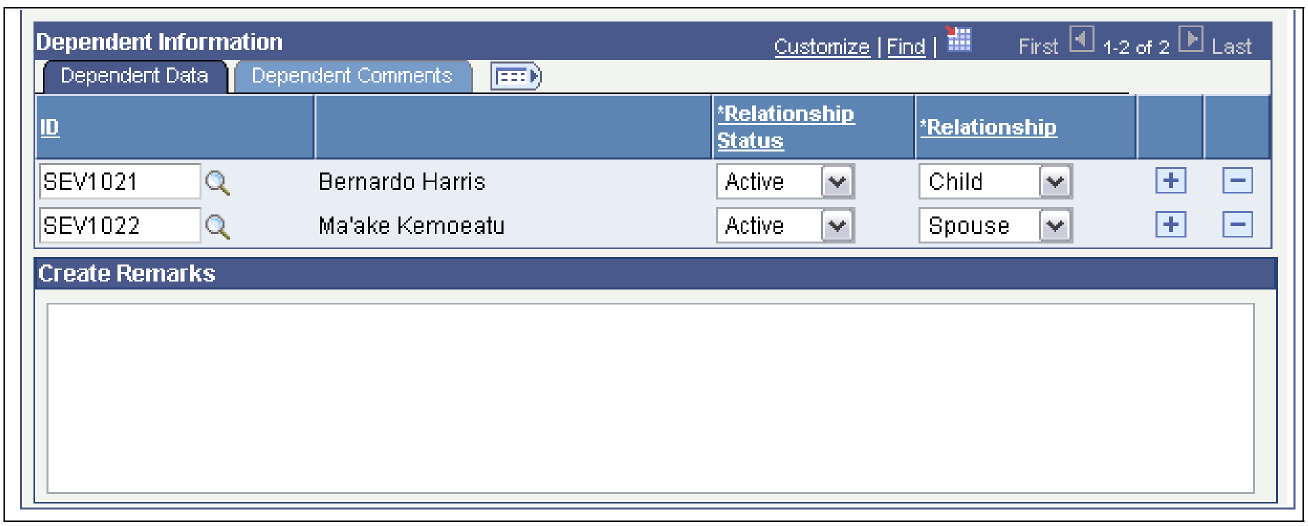
Other

*Level of Education: Bachelors Comment

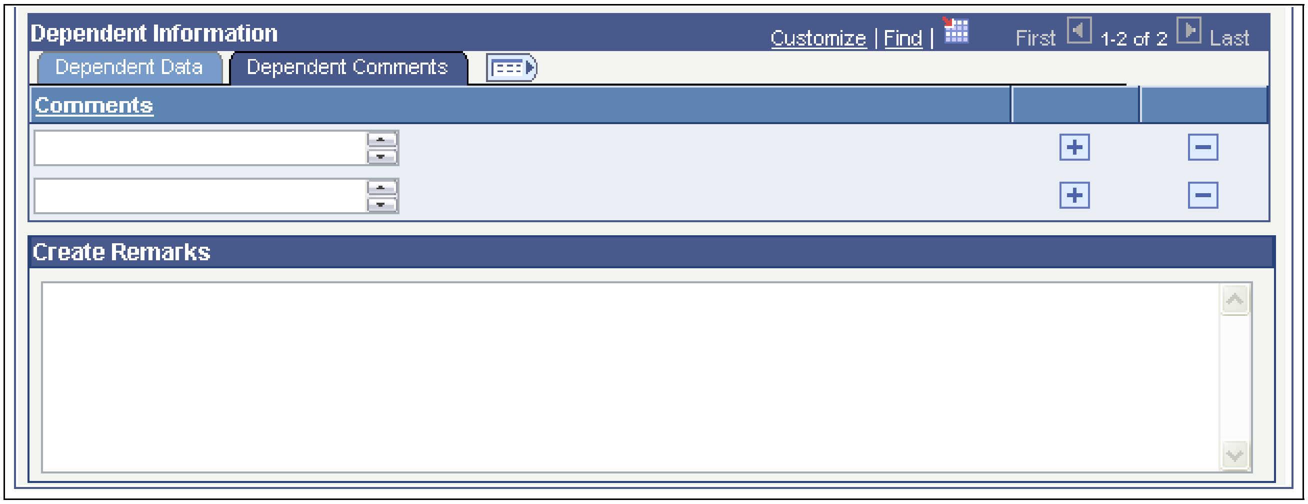
I-20 Form page (1 of 4)



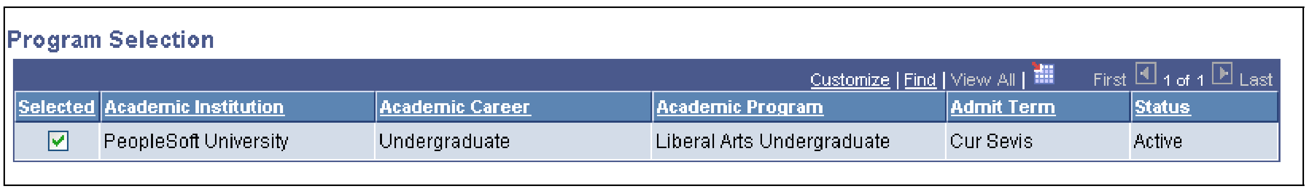
I-20 Form page (2 of 4)



I-20 Form page (3 of 4), Dependent Data tab



I-20 Form page (3 of 4), Dependent Comments tab


Program Selection

Selected	Academic Institution	Academic Career	Academic Program	Admit Term	Status
☑	PeopleSoft University	Undergraduate	Liberal Arts Undergraduate	Cur Sevis	Active

(I-20 Form) Program Selection page

I-20 Form Details

SEVIS Status

Displays the status of the student as reflected in the SEVIS Master component.

Status as of Effective Date

Enter the status as of the effective date. The default value is *Active.*

Only active I-20 form rows are included in the SEVIS Alerts - F/M process.

Cancellation Reason

If canceling the visa request, enter the cancellation reason.

Entering a Cancellation Reason will trigger the Status - Cancel event if the student has a SEVIS Status of *Initial.*

Available reasons include:

Arrived under different ID

Offer withdrawn

Record created in error

Registered under different ID

Student not attending

Visa for different SEVIS ID

Cap-Gap Status	Enter a value if requesting a Cap-Gap extension. Values are: *Cancelled* *Filed* *Waitlisted* The value triggers the CapGapExtension event if the I-20 end date is less than or equal to the system current date.
Institution, Career, Acad Program (academic program), and **Admit Term**	The system displays the following: The institution entered for the student. The career entered for the institution. The academic program entered for the career. The admit term entered for the student in the specified program.
Select Program Data	Click to access the Program Selection page where you can determine if more than one combination of institution, career, academic program, and admit term exists for the student. If more than one exists, select the check box on the Program Selection page for the line that contains the information that you want to print on the I-20 form. The valid institutions for the school code and the valid careers for the institution are based on the setup of the SEVIS School Code table.

Student Information

Family Name, First Name, and **Middle Name**	Displays the student's last, first, and middle names according to the respective name type entered on the SEVIS Setup page. **Note.** You must make any name changes on the Biographical Data page.
Date of Birth	Displays the birth date that is entered on the Biographical Details page.
Country of Birth	Displays the country of birth that is entered on the Biographical Details page.
Admission Number	Displays the I-94 admission number that is entered on the Port of Entry Data page.
Citizenship Country	Select the citizenship country to report to SEVIS. If the student has only one non-U.S. citizenship country, the system displays it by default. This field is required.

SEVIS Commuter

Select if the student is a commuter student.

The commuter student indicator is valid only for students whose country of citizenship is Canada or Mexico.

Commuter students are not required to provide U.S. address data.

Addresses

Select to view the foreign and U.S. addresses based on the address types entered on the SEVIS Setup page.

School Information

Displays the school official, title, address, and approval date information from the School Information section of the SEVIS School Code table.

Student Creation Reason

You can select only one reason. Options are:

Initial Creation

Initial - *Change of Status*

Continued Attendance

School Transfer Causes the Transfer Date field and text box to appear. You can enter the date, and in the text box, enter the name of the school from which the student transferred.

Reinstatement Request

Other Causes a text box to appear where you must also enter an explanation.

Note. SEVIS accepts the creation reasons of *Initial* and *Initial* - *Change of Status* in batch processing only.

Level of Education

Enter the individual's level of education. The options are based on the visa type entered for the student on the Visa/Permit Data page.

If a visa type is not entered for the student on the Visa/Permit Data page, no options are available here.

This value may appear by default from the I-20 template.

Note. A student must have a visa type on the Visa/Permit Data page for the system to send the student's information to SEVIS.

Values for F-1 visa classification are *Primary,Secondary, Associate, Bachelor's, Master's, Doctorate, High School, Language Training,* and *Other*.

Values for M-1 visa classifications are *High School, Flight Training*, and *Other Vocation School.*

Comment

Click to enter remarks related to the student's level of education.

Comments are required when the Level of Education field value is set to *Other.* Otherwise comments are optional.

All comments are sent to SEVIS when provided.

The student has been accepted for a full course of study

Primary Major,Secondary Major, and **CIP Code**

Primary major and secondary major information comes from the academic plan in the PeopleSoft Student Records Student Program/Plan component. The primary major is from the academic plan with the minimum sequence number and the secondary major is from the academic plan with the second most minimum sequence number, both are where the plan type is one of the selected major plan types on the SEVIS Setup page.

If no data exists for the academic plan, the information comes from the academic plan on the application in the PeopleSoft Student Admissions Maintain Applications component.

The CIP code is the code related to the academic plan as assigned on the Taxonomy page in the Academic Plan Table component (Set Up SACR, Foundation Tables, Academic Structure).

The CIP code is reported to SEVIS.

Minor and **CIP Code**

The minor is determined on the SEVIS Setup page.

The system compares information from either the Student Records academic plan or academic subplan where the plan types are equal to those on the SEVIS Setup page.

The minor selected is the minimum sequence number with the indicated plan type related to the primary major.

If no data exists for the Student Records academic plan or subplan, the information comes from the PeopleSoft Admissions academic plan or subplan on the application in the Maintain Application component.

The CIP code is the code related to the academic plan or academic subplan as assigned on the Taxonomy page in the Academic Plan component or the Academic Sub-Plan Taxonomy page in Academic SubPlan Table component (Set Up SACR, Foundation Tables, Academic Structure).

The CIP Code is reported to SEVIS.

Length of Study

Enter the number of months normally required for completing the program that the student undertakes.

This value may also display by default from the I-20 template.

From Date

By default, the system displays the start date of the student's Admit Term from the Student Records Student Program/Plan page or the Admissions Application Program Data page as the date when the student's program begins.

You can modify this.

If sending the Create Student event to SEVIS and the student creation reason is *Initial* or *Initial - Change of Status,* the from date must be later than or equal to the current system date.

If the Student Creation Reason is *Continue* the from date must be prior to the current system date.

To Date

Displays the date when the student's program is to be completed.

By default, the system adds the value from the Length of Study field to the from date and displays it here.

You can modify this.

English Proficiency required

Select this check box if the school requires English proficiency for this student.

If selected, you must indicate whether or not the student is proficient by selecting the appropriate values. Options are *Student is proficient* or *Student is not proficient yet.*

If this check box is not selected, you must provide an explanation in the text box of why English proficiency is not required at the school.

School estimates student average academic cost for

Months in an academic term

Enter the number of months that the student is to attend courses during an academic term.

This value may also appear by default from the I-20 template.

Tuition and fees

Enter the total amount of tuition expenses that the student must pay.

This value may also appear by default from the I-20 template.

Other expenses

Enter other expenses that the student must pay.

If you enter a value, you must click *Description* and provide an explanation of the other expense.

This value may also appear by default from the I-20 template.

Description

Click to access the page where you must provide an explanation of the other expenses.

Living Expenses

Enter the total amount of living expenses that the student must pay.

This value may also appear by default from the I-20 template.

Dependent Expenses

Enter the total amount of dependent expenses that the student must pay.

Enter a value here only if the student is accompanied by dependents.

This value may also appear by default from the I-20 template.

Student means of support for the above length of time

Student's personal funds

Enter the total amount of personal funds available to the student for use in paying for expenses.

Funds from this school

Enter the total amount of funds being provided by the school.

If you enter a value here, you must also click *Fund Type* and enter an explanation of the funds provided by the school.

Fund Type

Click to access the page where you enter an explanation of the type of funds provided by the school.

Funds from another source

Enter the total amount of funds provided from another source.

If you enter a value here, you must also click *Description* and enter an explanation describing the source of the other funding.

Description

Click to access the page where you enter a description of the source of the other funding.

On-campus employment

Enter the total amount of funds available to the student through on-campus employment.

Funding Verified

Select this check box when the student's funding is verified and the student information is ready to send to SEVIS.

You must select this check box for the student information to be processed for sending to SEVIS. Failure to select it results in the student's information not being selected for submission to SEVIS.

The check box becomes unavailable and an error message appears, if:

- The total means of support provided by the student is not equal to or greater than the total expenses.
- No visa type is entered for the student.
- A dependent is entered, but no dependent expenses are entered.
- Dependent expenses are entered, but no dependent is entered.

Funding Remarks

Enter optional, general remarks associated with the funding information.

School Certification

School Official	Enter the designated school official (DSO) responsible for the student's record. This prompt list includes only the DSOs assigned to the school code on the SEVIS School Code table. This value may also appear by default from the I-20 template.
Title	The system displays the title for the DSO from the SEVIS School Code table.
Date Issued	Enter the date when the I-20 form was issued or entered. The default date is the system date. You can modify it. The date is for reference only. It is not sent to SEVIS. The DHS provides the issue date on the I-20 PDF returned from SEVIS.
City and **State**	Displays the city and state for the DSO from the School Information section of the SEVIS School Code table.

Dependent Information

Enter dependent information.

Warning! Do *not* delete dependent rows unless you make an error in adding the dependent's ID. If you delete the dependent ID, the dependent events will not be reported to SEVIS. Change the status of the dependent to *Cancelled* or *Terminated* instead of deleting the row. If you try to delete the dependent, you receive a warning regarding the ramifications.

ID	Enter the ID of each person accompanying the student as a dependent. (Dependents and their IDs must appear on the Biographical Details page.) Consult the U.S. Immigrations and Customs Enforcement web site for required data for each dependent. See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Relationship Status	Enter the status of the dependent: *Active, Cancelled,* or *Terminated.* If the status is *Active,* the dependent is reported with the student during the Create Student event or the Dependent - Add event if a Create Student event was previously sent. The Dependent - Reactivate event also uses this value. If the status is changed to *Terminated,* and the student has a SEVIS Status of *Active,* the Dependent - Terminate event is triggered. If the status is changed to *Cancelled,*and the student has a SEVIS Status of *Initial,*the Dependent - Cancel event is triggered. This is a required field with a default value of *Active.*
Relationship	Enter the dependent's relationship to the student. Values include *Child* and *Spouse.* Regulations permit only one spouse to accompany the student during study in the U.S. If you enter more than one dependent as a spouse, you receive an error. This is a required field.
Reason	This field appears only when the Relationship Status field is set to *Terminated* or *Cancelled.* If Relationship Status is *Terminated,* you must provide the reason for that action. The termination reasons listed are the values provided by the DHS and sent as part of the Dependent - Terminate event. If the *Relationship Status* is *Cancelled,* you must provide the reason for that action. The cancellation reasons listed are the values provided by the DHS and sent as part of the Dependent - Cancel event.
Other Reason	This link appears only when the Relationship Status field is set to *Terminated* and the Termination Reason is *Other.* Select the link to enter a further explanation of the termination reason. This field is required if Termination Reason is *Other*.
Dependent Remarks	Enter any additional remarks regarding the dependent. Remarks are optional, but if provided are reported to SEVIS with the following events: Create Student, Dependent - Add, Dependent - Edit, Dependent - Cancel and Dependent - Terminate.
Create Remarks	Enter any additional remarks regarding the student. Remarks are optional, but if provided are reported to SEVIS with the Create Student event.

Creating and Updating Exchange Visitor Data for DS-2019 Forms for J Visas

The DS-2019 form pages included in the PeopleSoft system display relevant DS-2019 form data in a sequence similar to the actual DS-2019 form document produced by SEVIS. The SEVIS system produces the DS-2019 form in PDF format using data provided by your institution.

PeopleSoft DS-2019 Form pages are keyed by exchange visitor's ID and program number. Access to the form is controlled through SEVIS program sponsor security.

Note. The PeopleSoft system requires that any exchange visitor for whom you enter DS-2019 form data, must have the appropriate J-1 visa type defined on the Visa/Permit Data page.

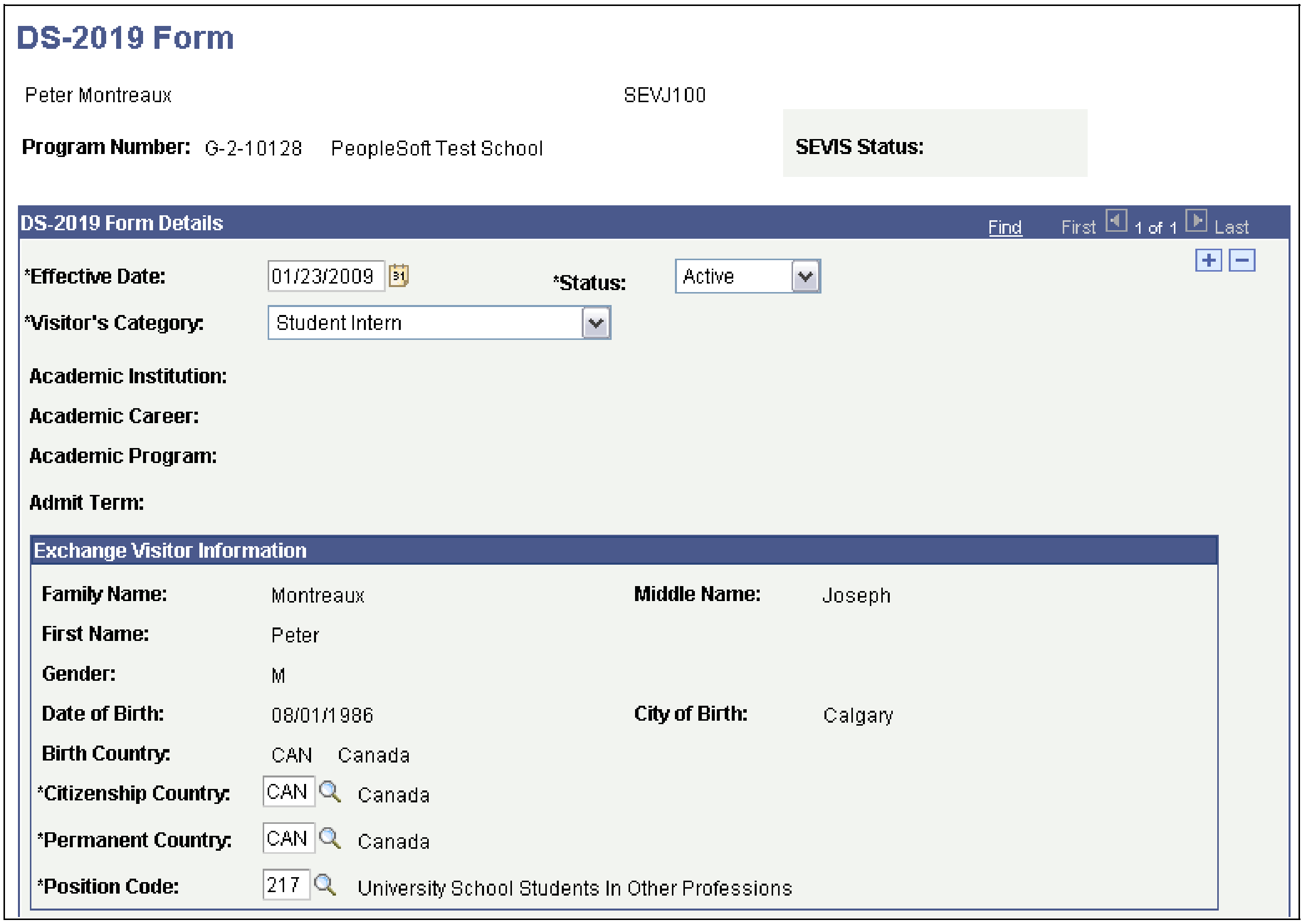
This section discusses how to create and update DS-2019 form data.

Pages Used to Create and Update Exchange Visitor Data for DS-2019 Forms for J Visas

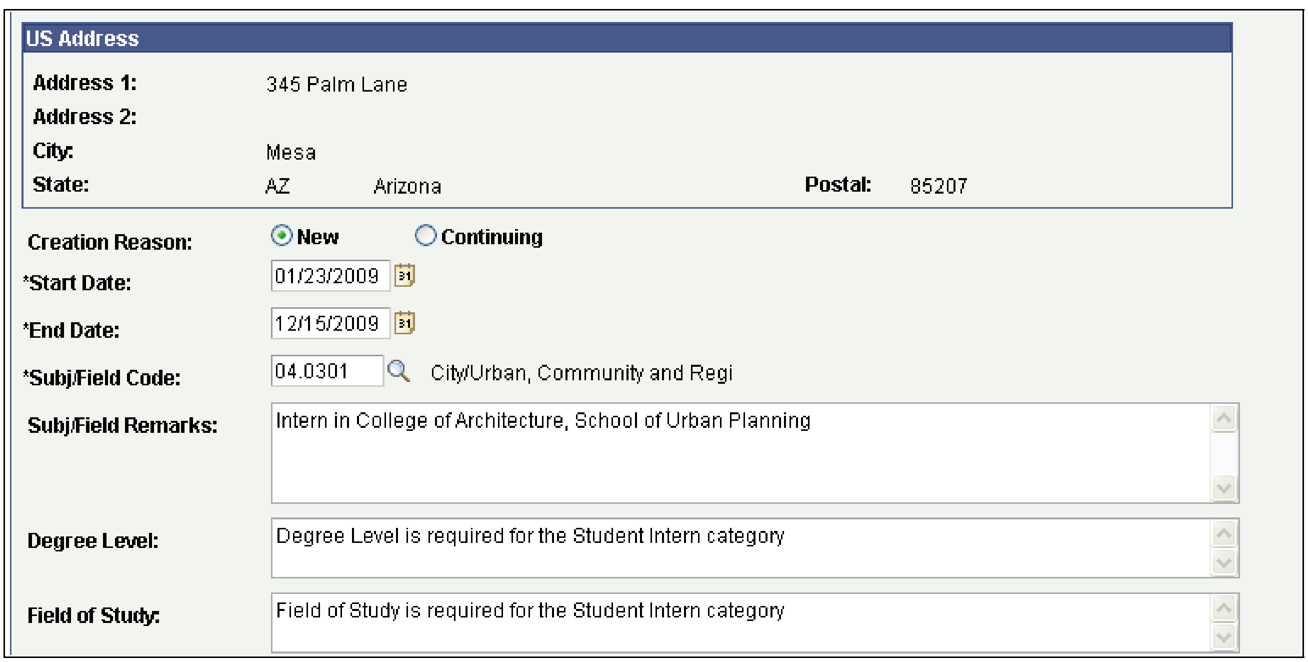
Page Name	***Definition Name***	***Navigation***	***Usage***
DS-2019 Form	DS2019_FORM	Campus Community, SEVIS, DS-2019 Forms, DS-2019 Form	Create or update DS-2019 information for exchange visitor J visas.
Program Selection	SEV_DS_SEL_SEC	Click the Select Program Data link on the DS-2019 Form page.	Select the program to submit for a student category exchange visitor.
Dependent Details	DS2019_DEP_SEC	Click the Details link in that appears in the Dependent Information section of the DS-2019 Form page when the Relationship Status is either *Terminated* or *Ended Status.*	Enter the reason for changing a dependent's Relationship Status to *Terminated* or *Ended Status.*

Entering DS-2019 Form Data

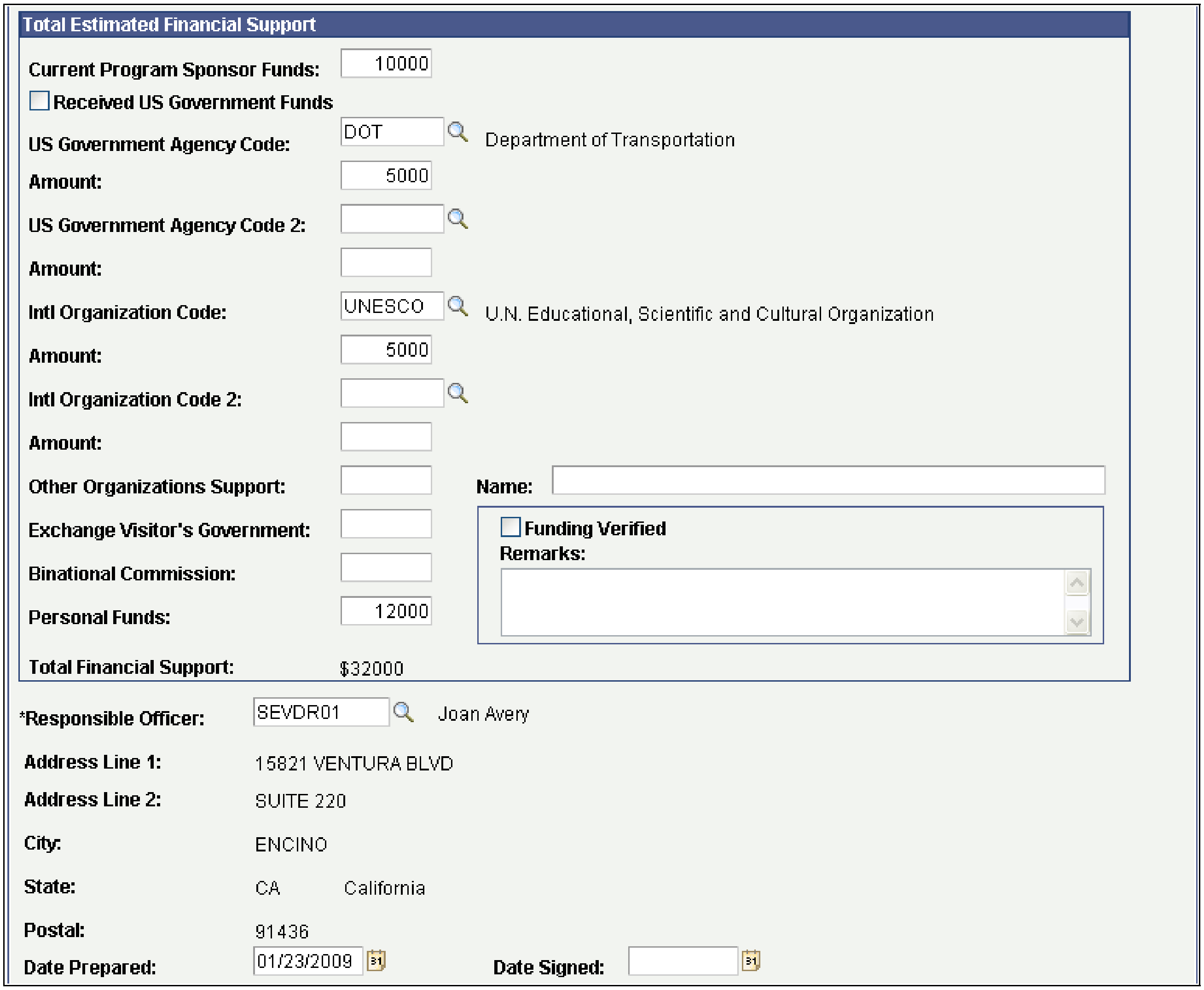
Access the DS-2019 Form page (Campus Community, SEVIS, DS-2019 Forms, DS-2019 Form).



DS-2019 Form page (1 of 4)



DS-2019 Form page (2 of 4)


Total Estimated Financial Support

Current Program Sponsor Funds: 10000

☐ Received US Government Funds

US Government Agency Code: DOT Department of Transportation

Amount: 5000

US Government Agency Code 2:

Amount:

Intl Organization Code: UNESCO U.N. Educational, Scientific and Cultural Organization

Amount: 5000

Intl Organization Code 2:

Amount:

Other Organizations Support: Name:

Exchange Visitor's Government:

Binational Commission:

Personal Funds: 12000

☐ Funding Verified

Remarks:

Total Financial Support: $32000

*Responsible Officer: SEVDR01 Joan Avery

Address Line 1: 15821 VENTURA BLVD

Address Line 2: SUITE 220

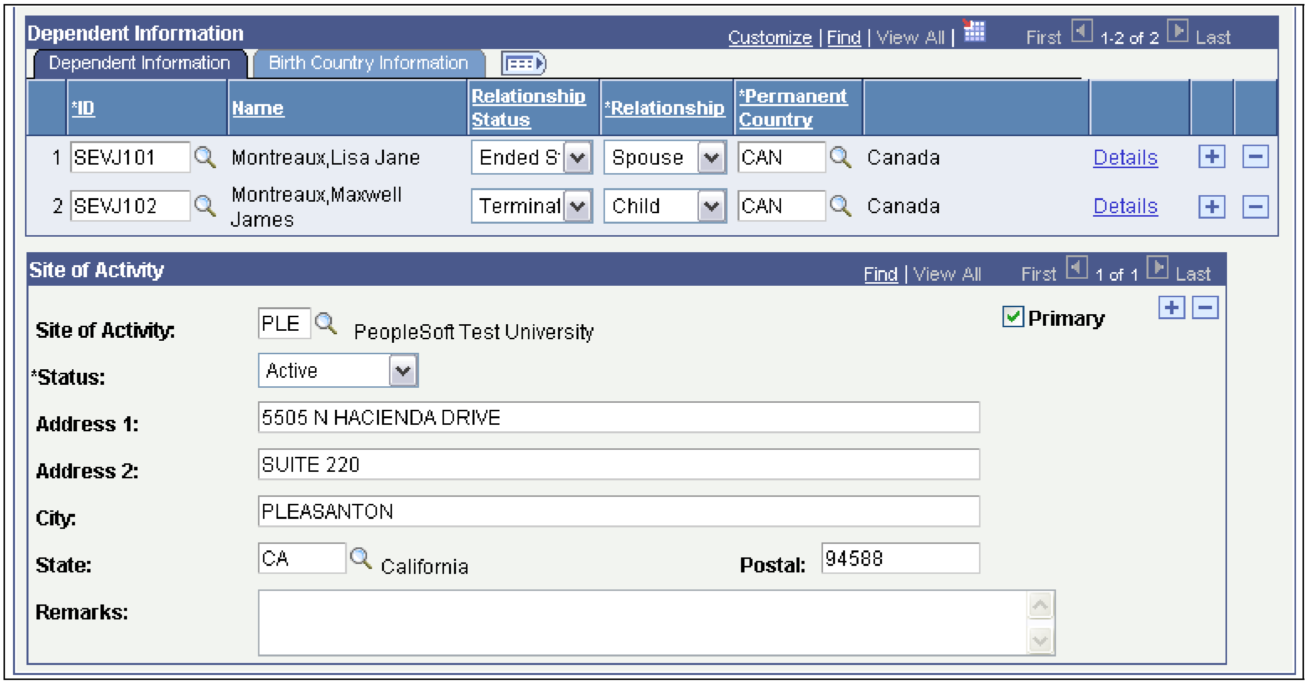
City: ENCINO

State: CA California

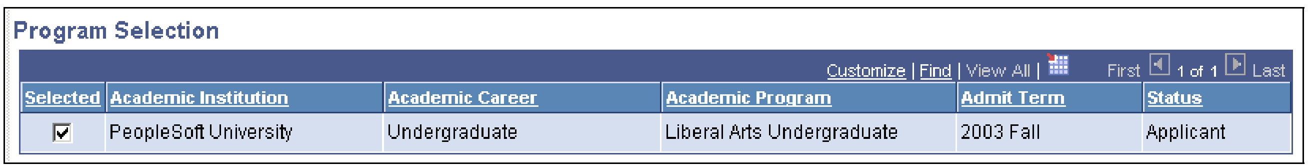
Postal: 91436

Date Prepared: 01/23/2009 Date Signed:

DS-2019 Form page (3 of 4)



DS-2019 Form page (4 of 4)



(DS-2019) Program Selection page

DS-2019 Form Details

SEVIS Status

Displays the status of the exchange visitor as reflected in the SEVIS Master.

Status

Enter the status as of the effective date. The default value is *Active.*

Only active DS-2019 form rows are included in the SEVIS Alerts - J process.

Visitor's Category

Select the appropriate category for the exchange visitor.

Values are:

Alien Physician

Aupair

Camp Counselor

Government Visitor

Intern

International Visitor

Professor

Research Scholar

Short-term Scholar

Specialist

Student Associate

Student Bachelors

Student Doctorate

Student Intern

Student Masters

Student Non-Degree

Student Secondary

Summer Work/Travel

Teacher

Trainee

Trainee (Non-speciality)

Trainee (Specialty)

This field is required. The system uses this value to enforce minimum and maximum duration of stay rules when you save the page.

Academic Institution, Academic Career, Academic Program, and **Admit Term**

If you select any of the student categories other than *Student Intern* in the Visitors Category field, the system displays the following:

- The institution entered for the student,
- The career entered for the institution,
- The academic program entered for the career, and
- The admit term entered for the student exchange visitor in the specified program.

Select Program Data

Click to access the Program Selection page, where you can determine if more than one combination of institution, career, academic program, and admit term exists for the student exchange visitor.

If more than one exists, select the check box on the Program Selection page for the line that contains the appropriate information to print on the DS-2019 form.

The valid institutions for the program number and the valid careers for the institution are based on the setup of the SEVIS Program Sponsor table.

Exchange Visitor Information

Family Name, First Name, and **Middle Name**

Displays the exchange visitor's last, first, and middle names according to the name type entered on the SEVIS Setup page.

Note. You must make any name changes on the Biographical Details page

Gender, Date of Birth, City of Birth, and **Birth Country**

Displays data entered on the Biographical Details page.

Birth Country Reason

This field appears only if the birth country is USA or a U.S. territory.

SEVIS requires that you enter the applicable reason, either *Born to Foreign Diplomat* or *Expatriated.*

Country

Select the citizenship country to report to SEVIS.

If the exchange visitor has only one non-U.S. citizenship country, the system displays it by default.

This field is required.

Permanent Country

Select the country of permanent residence to report to SEVIS.

This field is required.

Position Code

Select the position to report to SEVIS that describes the exchange visitor in his or her home country.

This field is required.

US Address

Address 1, Address 2, City, and **State**

Displays the exchange visitor's address based on the address type entered on the SEVIS Setup page for the U.S. address.

If this address is blank, the system reports the Program Sponsor Address in the Create EV event as the U.S. address for the exchange visitor.

Creation Reason

You can select only one reason, either *New* or *Continuing.*

If you select *New*, the Start Date and End Date fields appear. You must enter the exchange program start and end dates.

If you select *Continuing,* the Initial Start Date, Form Number, Start Date, and End Date fields appear. You must enter the exchange program's original start date and the number of the assigned IAP-66 or DS-2019 form in addition to the exchange program start and end dates.

Note. The creation reason is no longer reported to SEVIS in batch, therefore it is assumed that all exchange visitors have a creation reason of *New.* Use *Continuing* only for recording historical data. A warning appears when you save the DS-2019 Form with a creation reason of *Continuing.*

Start Date and **End Date**

Enter the date that the exchange visitor's program begins and the date that the program is to be completed.

A visitor cannot enter the U.S. more than 30 days prior to program start date. Exchange Program start date must be equal to or later than the current date. The system delivers an error if the start date is not equal to or later than the current system date.

Also, the program duration cannot exceed the maximum duration of stay and cannot be less than the minimum duration of stay.

These are required fields.

Initial Start Date and **Form Number**

For a creation reason of *Continuing,* you must enter the original date when the exchange visitor's program began and the number of the IAP-66 or DS-2019 form assigned to the exchange visitor.

The initial start date must predate the current date. The system delivers an error if the start date is not prior to the current date.

The format for the form number is X-1-12345-1234567. The system delivers an error if the format is not correct.

Both the Initial Start Date and Form Number fields are required for a creation reason of *Continuing.*

Subj/Field Code (subject/field code)	Enter the CIP code that represents the exchange visitor's subject or field of study. The field is available or unavailable based the Visitor's Category selected. For student categories *(Student Associate,Student Doctorate,Student Intern,* and so on), the subject and field of study information comes from the student program/plan academic plan with the minimum sequence number where the plan type is equal to the plan types defined for primary major on the SEVIS Setup page. If no data exists on the student program/plan academic plan, the information comes from the academic plan in the Maintain Applications component. For nonstudent categories (Alien Physician, Aupair, Camp Counselor, Intern, and so on), you must enter the subject or field of study. The CIP code is the code related to the academic plan as assigned on the Taxonomy page in the Academic Plan Table component (Set Up SACR, Foundation Tables, Academic Structure). This field is required. The CIP code is reported to SEVIS. If the exchange visitor code is a program category other than *Student,* the field is available and you must select the appropriate subject/field code.
Subj/Field Remarks	Enter remarks to further describe the subject and field of study. Remarks are required.
Degree Level and Field of Study	These fields appear only when Visitor's Category is set to *Student Intern.* Degree Level and Field of Study are required fields for a Visitor's Category of *Student Intern.*

Total Estimated Financial Support

You must enter at least one amount of monetary support in this section

Current Program Sponsor Funds	Enter the U.S. dollar amount of financial support provided by the program sponsor.
Received US Government Funds	Select to report to SEVIS that the exchange visitor has received funding from the U.S. Government.
US Government Agency Code and **Amount;US Government Agency Code 2** and **Amount**	Enter the U.S. Government organization that is providing funds to the exchange visitor, and the U.S. dollar amount of the funding they provide. For each agency that you enter, you must also enter the amount of funding. If you enter a value of *OTHER* in either the US Government Agency Code or US Government Agency Code 2 field, you must enter the name of the agency in the Name field. SEVIS requires that you enter the name of the US government agency providing funds.

Intl Organization Code (international organization code) and **Amount;Intl Organization Code 2** (international organization code 2) and **Amount**

Enter the international organization that is providing funds to the exchange visitor, and the U.S. dollar amount of the funding they provide.

For each organization that you enter, you must also enter the amount of funding.

If you enter a value of *OTHER* in either the Intl Organization Code or Intl Organization Code 2 field, you must enter the name of the organization in the Name field. SEVIS requires that you enter the name of the international organization providing funds.

Other Organizations Support and **Name**

Enter the total U.S. dollar amount of funding provided by any other organization, and enter the name of the organization.

Exchange Visitor's Government

Enter the U.S. dollar amount of funding provided by the government of the exchange visitor's country.

Binational Commission

Enter the U.S. dollar amount of funding provided by the binational commission of the exchange visitor's country.

Personal Funds

Enter the total amount of personal funds available to the exchange visitor for expenses.

Total Financial Support

The system calculates the total of funds entered on this page and displays the total here.

Funding Verified and **Remarks**

Select this when the exchange visitor's funding is verified and the exchange visitor information is ready to send to SEVIS. Enter optional, general remarks associated with the funding information.

You must select the Funding Verified check box for the exchange visitor information to be processed for sending to SEVIS. Failure to select it results in the exchange visitor's information not being selected for submission to SEVIS.

The check box becomes unavailable and an error message appears if:

- No visa type is entered for the exchange visitor.
- The visa type is not mapped to 03 on the Visa Mapping page.
- No amount of financial support is entered.

Responsible Officer

Enter the RO/ARO responsible for the exchange visitor's record. This prompt displays only the RO/AROs assigned to the Program Sponsor on the SEVIS Program Sponsor table.

This field is required.

Address Line 1, Address Line 2, City, State, and **Postal**

Displays the address data entered in the Program Sponsor Information section of the SEVIS Program Sponsor table for the selected responsible officer.

Date Prepared

Enter the date when the DS-2019 form was issued or entered.

The default date is the current system date. You can modify it.

This date is informational only and is not sent to SEVIS. The DHS provides the date prepared on the DS-2019 PDF returned from SEVIS.

Date Signed

Enter the date that the DS-2019 form was signed.

This date is informational only. It is not sent to SEVIS.

Dependent Information

Enter dependent information.

Warning! Do *not* delete dependent rows unless you make an error in adding the dependent's ID. If you delete the dependent ID, the dependent events are not reported to SEVIS. Change the status of the dependent to *Deleted*,*Ended Status*, or *Terminated* instead of deleting the row. If you try to delete the dependent row, you receive a warning regarding the ramifications.

ID

Enter the ID of each person accompanying the exchange visitor as a dependent. (Dependents and their IDs must appear on the Biographical Details page in the Add/Update a Person component.)

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Relationship Status

Enter the status of the dependent: *Active*,*Deleted*,*Ended Status*, or *Terminated.*

If the status is *Active*, the dependent is reported along with the exchange visitor on the Create EV event or the Dependent - Add event if a Create EV event was previously sent.

If the status is changed to *Terminated,* the Dependent - Terminate event is triggered.

If the status is changed to *Ended Status,* the Dependent – End Status event is triggered.

If the status is changed to *Deleted*, the Dependent – Delete event is triggered.

The Dependent – End Status and Dependent – Terminate events trigger only if the exchange visitor's SEVIS status is *Active.*

The Dependent - Delete event triggers only if the exchange visitor's SEVIS status is *Initial.*

This is a required field with a default value of *Active.*

Relationship

Enter the dependent's relationship to the exchange visitor. Values are *Child* or *Spouse.*

Regulations permit only one spouse to accompany the exchange visitor during study in the U.S. If you enter more than one dependent as a spouse, you receive an error.

This is a required field.

Permanent Country

Select the country to report to SEVIS as dependent's country of permanent residence.

This is a required field.

Details

Appears only if the Relationship Status field is set to *Ended Status* or *Terminated.*

Click to access the Dependent Details page where you must enter the reason for the status – either an end of status reason or termination reason respectively.

Remarks

Enter any additional remarks regarding the dependent.

Remarks are optional, but if provided are reported to SEVIS with the Create EV, Dependent - Add, Dependent - Edit, Dependent - Cancel, and Dependent - Terminate events.

Country Reason

This field appears only if the birth country is USA or a US Territory. You must enter the applicable reason, either *Born to Foreign Diplomat* or *Expatriated.*

Site of Activity

Enter information about the site of the exchange visitor activity.

Warning! Do *not* delete site of activity rows unless you make an error in adding the site of activity. If you delete the site of activity, the site of activity events are not reported to SEVIS. Change the status of the site of activity to *Inactive* instead of deleting the row. If you try to delete the site of activity, the system displays a warning regarding the ramifications.

Site of Activity

Enter the site of activity to report to SEVIS.

The default value is the site that is set up on the SEVIS Program Sponsor table. You can add multiple sites of activity when creating an exchange visitor.

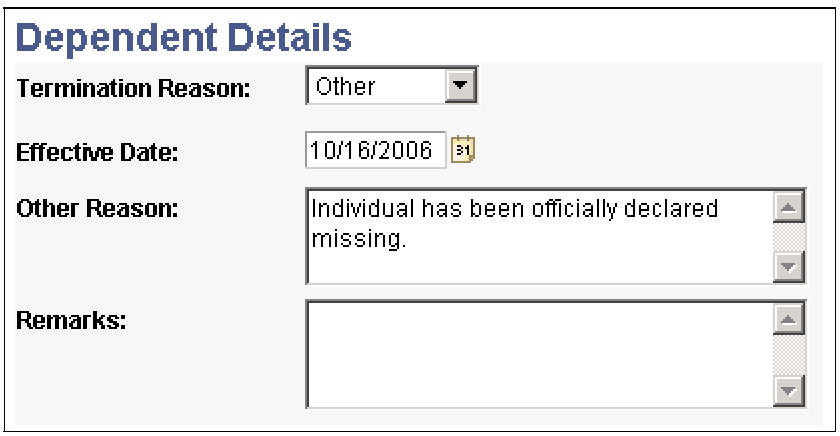
Primary

Select to indicate the site is the primary site to print on the DS-2019 Form.

Status	Enter the status of the site of activity. The default value is *Active.* If you change the status to *Active*, the system reports a Site of Activity - Add event to SEVIS if a Create EV has already been sent. If you change the status to *Inactive*, the system reports a Site of Activity - Delete event to SEVIS.
Address 1, Address 2, City, State, and**Postal**	Enter address data for the site from the Site of Activity table. The system displays this information from the Site of Activity Table, but is editable. Changing this data after it is sent to SEVIS triggers a Site of Activity – Edit event.
Remarks	Enter remarks to further describe the site of activity. The system sends these remarks to SEVIS with the Site of Activity - Add, Site of Activity - Edit, and Site of Activity - Delete events.

Dependent Details page

Access the Dependent Details page (click the Details link in that appears in the Dependent Information section of the DS-2019 Form page when the Relationship Status is either *Terminated* or *Ended Status).*



Dependent Details

Termination Reason: Other

Effective Date: 10/16/2006

Other Reason: Individual has been officially declared missing.

Remarks:

Dependent Details page

Fields appear on this page based on the dependent's Relationship Status, either *Terminated* or *Ended Status.*

Termination Reason or **End Status Reason**	If you change a dependent's Relationship Status to *Terminated,* the Termination Reason field appears where you must enter a reason for terminating the dependent. Valid values are: *Conviction of a Crime, Unauthorized Employment,* and *Other.* The available reasons listed are the values provided by the DHS and sent as part of the Dependent - Terminate event. If you change a dependent's Relationship Status to *Ended Status* the *End Status Reason* field appears where you must enter a reason for ending the dependent's status. Valid values are: *Death, Divorce, Other,* or *Over 21.* For either *Terminated* or *Ended Status,* if you select a reason of *Other* you must also complete the Other Reason field. You can submit only one reason to SEVIS. The system displays an error if you attempt to enter both an termination and an end status reason.
Effective Date	Appears only if you enter a termination reason. Enter the termination date for the dependent. The field is required for a termination reason.
Other Reason	Appears if you enter an end status reason or termination reason of *Other.* Provide an explanation for the reason entered. This field is required for an end status reason or termination reason of *Other.*
Remarks	Enter any additional remarks about the end of status or termination. Remarks are optional, but if provided are reported to SEVIS with the Dependent - Terminate or Dependent - End Status events.

Using Dependent Search

Using Dependent Search, you can search on a dependent's name to determine who the individual's primary document holder is and how the dependent and primary document holder are related. The system looks at I-20 and DS-2019 forms data to return the results of the search.

Page Used for Dependent Search

Page Name	***Definition Name***	***Navigation***	***Usage***
Dependent Search	SEV_DEP_SRCH	Campus Community, SEVIS, Search Tools, Dependent Search	Find the primary document holder for a dependent.

Using Dependent Search

Access the Dependent Search page (Campus Community, SEVIS, Search Tools, Dependent Search).

Dependent Search page

Spouse of or **Child of**

Displays the ID of the dependent's primary document holder, either Spouse of or Child.

The field label change to reflect the dependent's relationship to the primary document holder. For example, suppose that Gabriel Fisher, the dependent on whom you search, is the son of the primary document holder. The field label would be *Child of.*

School Code or **Program Number**

Displays the SEVIS school code or program number from the primary document holder's I-20 or DS-2019 form if the form data contains the dependent's ID.

The School Code field appears only if the system finds I-20 form data that contains the dependent's ID.

The Program Number field appears only if the system finds DS-2019 form data that contains the dependent's ID.

View Form

This link appears only if you have security access to the school code or program number listed.

Click to access the form, either the I-20 or DS-2019 form, on which the system found the dependent's ID. The form appears in a new browser window in update/display mode.

If you do not have the security access to the school code or program number, this link does not appear and you are not able to view the forms.

Running the SEVIS Alerts Process

The SEVIS Alerts process identifies data changes that are reportable to SEVIS, logs those changes, and copies all relevant data into the Select Alerts to Report component for review before you submit the data to SEVIS. You can set the process to run at scheduled intervals. Each time the SEVIS Alerts process (for F/M visas or for J visas) runs, the SEVIS alerts data is moved to SEVIS events history and the SEVIS Alerts process records are refreshed with data from the new run of the process.

Before running the process again, allow for the processing time required for SEVIS to return batch results and to run the SEVIS Import Results process. Refer to the process flow to better understand and determine when to run the SEVIS Alerts process.

This section discusses how to:

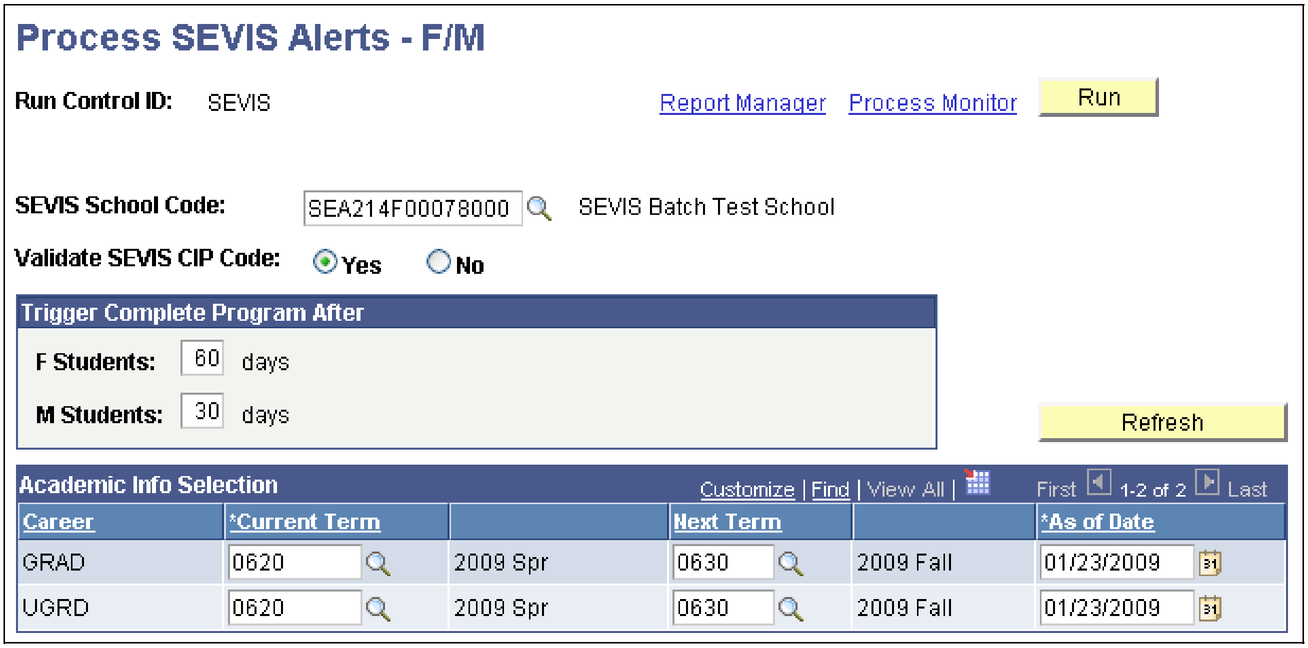
- Run the SEVIS Alerts process for F and M visas.
- Run the SEVIS Alerts process for J visas.

Page Used to Run the SEVIS Alerts Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Process SEVIS Alerts - F/M, Process SEVIS Alerts - J	RUNCTL_CCSEVCMP	• Campus Community, SEVIS, F/M Alerts, Process SEVIS Alerts - F/M • Campus Community, SEVIS, J Alerts, Process SEVIS Alerts - J	Determine the events sent to the SEVIS Alerts table and extract the data to be sent to SEVIS for the respective visa type (F/M or J).

Running the SEVIS Alerts Process for F and M Visas

Access the Process SEVIS Alerts - F/M page (Campus Community, SEVIS, F/M Alerts, Process SEVIS Alerts - F/M).



Process SEVIS Alerts - F/M page

The SEVIS Alerts process detects changes to your international student population that should be reported to SEVIS. A unique batch ID is generated each time the process runs. The naming scheme for this batch ID is YYYYMMDD-NNNNN, where YYYYMMDD represents the date on which the process runs and NNNNN represents the unique counter number. For example, the batch ID 20021219-00001 indicates that the process was run on December 19, 2002 and 00001 is the unique counter number. This batch ID and the SEVIS school code are keys to the records that you review on the Alerts Header page in the Select Alerts to Report - F/M component.

Note. All reportable institutions and careers for the SEVIS school code must appear on this page or the data will not be reported to SEVIS.

SEVIS School Code	Enter the SEVIS school code for the process that you want to run.

Validate SEVIS CIP Code

Select *Yes* for the alerts process to compare CIP codes against the corresponding CIP Code Table page (Set Up SACR, Foundation Tables, Reporting Codes, CIP Code Table). When the Valid SEVIS CIP Code field on the CIP Code Table page is set to *Yes*, the process compares the code in the event against the valid code on the table. If the codes do not match, or if no valid code is available for comparing (the Valid SEVIS CIP Code on the CIP Code Table page is set to *No)*, the process generates an error message that appears in the alerts.

The validation process checks for valid CIP codes for these F/M events:

- Create Student, Education Level **–** Add.
- Education Level **–** Cancel.
- Program **–** Edit.

Select *No* to disable the automatic CIP code validation process. When the validation process is disabled, no validation notices appear in the alerts.

Refresh

Click to refresh the page with data retrieved for the specified school code.

Trigger Complete Program After

If you enter a 0 or no number in the F Students or M Students fields, the Program - Complete event will trigger and appear on alerts for a complete program, but not based on the I-20 or OPT end date.

F students

Enter the number of days after either the I-20 end date or the OPT end date has passed for a complete program event to appear on the Alerts page for an F-1 student.

The number can be between 0 and 60.

M students

Enter the number of days after either the I-20 end date or the OPT end date has passed for a complete program event to appear on the Alerts page for an M-1 student.

The number can be between 0 and 30.

Academic Information Selection

As of November 15, 2003, DHS regulations changed for reporting a registration event. The regulations changed from having to report the event within 90 days from the current term start date to having to report it within 30 days from the current term start date. The As of Date on the SEVIS Alerts process reflects this 30-day requirement.

Institution and **Career**

The system displays values for these when you click Refresh. You cannot edit values for these on this page. You must make valid changes for the SEVIS school code on the SEVIS School Code Table page.

The Institution field appears only if more than one institution is mapped to the SEVIS school code.

Current Term	Enter the current term for each institution and career listed. The current term appears by default if the system date is between the term begin and end dates and only one term is defined for the institution and career within those dates. The current term value is used to determine the current session end date that is reported to SEVIS, and it is also used for the Registration and Auth Drop Below FC events.
Next Term	Enter the term that follows the current term for each institution and career listed. The prompt displays all terms for which the start date is greater than the system date. This term is used to determine the next session start date that is reported to SEVIS.
As of Date	Enter the date for each institution and career listed. The Registration and Auth Drop Below FC events are triggered based on this date. DHS regulations require that you report the Registration event within 30 days of the current term start date. You receive an error if the date that you enter does not meet the criteria. You can set this date prior to the start date of the current term entered if you want to report the Registration event prior to the current term begin date. You should update this field each time the Current Term and Next Term fields are refreshed.

When you have entered the data, click Run to run the process.

Note. A warning message appears if the SEVIS Alerts process has been run in the past 12 hours. If any of the process's work was in progress when the SEVIS Alerts process for F/M visas runs again within that time period, you might lose the results of that work.

This table lists, by event, what must happen for an event to appear in the Alerts Header page for a student.

Event	***Trigger Logic***
Create Student	Student has an immigration status on the Port of Entry Data page that equals the SEVIS visa type 01 (F-1) or 02 (M-1). *OR* If the Immigration Status field is blank on the Port of Entry Data page, the student has a visa type on the Visa/Permit Data page that equals SEVIS visa type 01 (F-1) or 02 (M-1) where the country is USA. *AND* The most recent effective-dated I-20 form has a status equal to *Active.* *AND* The most recent effective-dated I-20 form has the Funding Verified field set to*Y.* *AND* No rows exist in the SEVIS Master component for the user ID and school code on the I-20 form. **Note.** For F-1 students, if the Secondary Major CIP and Minor CIP fields are not populated from the academic record of the student during the alerts process, then the process enters a CIP code of 00.0000 for those fields.
Selection Criteria for All Events Listed Below	Student has an immigration status on the Port of Entry Data page that equals the SEVIS visa type 01 (F-1) or 02 (M-1). *OR* If the Immigration Status field is blank on the Port of Entry Data page, the student has a visa type on the Visa/Permit Data page that equals SEVIS visa type 01 (F-1) or 02 (M-1). *AND* The most recent effective-dated I-20 form has an Effective Status of *Active.* *AND* The most recent effective-dated I-20 form has Funding Verified set to *Y.* *AND* The SEVIS Status field in the SEVIS Master component is *Initial* or *Active.*

Event	***Trigger Logic***
Auth Drop Below FC – Add	The student has a SEVIS Status of *Active.* The As of Date field on the Process SEVIS Alerts – F/M page is earlier than or equal to the date when the process is run. *AND* The Registration event has been previously sent for the current term on the run control page. *AND* The Auth Reason field is either blank on the Registration page of the SEVIS Master component or the end date of the specified Auth Reason has passed. *AND* The total number of currently enrolled units for all institutions, careers, and current terms on the Process SEVIS Alerts - F/M page is less than the minimum full time level/load rules units for the academic program on the most recent effective-dated I-20 form. If Instruction Mode values are entered on the SEVIS Setup table, compare to Instruction Mode on Class table. If equal, use only the one class where STDNT_ENRL.UNT_TAKEN is greatest toward calculating full time. If no Instruction Mode values are entered on the SEVIS Setup table, apply all classes toward calculating full time. *AND* No Full Course Exception value exists for the run control term or the units do not meet those required for the exception. **Note.** You can also manually enter this event on the Select Alerts to Report – F/M component.
Auth Drop Below FC – Cancel	This event is manually entered on Alerts – F/M. No logic exists to trigger the event. To manually enter the event, the following conditions must be met: SEVIS Status is *Active.* *AND* No inactive effective status rows exist on the SEVIS Master component, Registration page. *AND* A Drop Below Full Course Auth Reason value exists, *AND* The Drop Below Full Course Start Date value on the SEVIS Master component is later than the current system date.

Event	***Trigger Logic***
Auth Drop Below FC – Edit	This event is manually entered on Alerts – F/M page. No logic exists to trigger the event. To manually enter the event, the following conditions must be met: The student has a SEVIS Status of *Active,* *AND* No inactive effective status rows exist on the SEVIS Master component, Registration page. *AND* A Drop Below Full Course Auth Reason value exists. If the date when the event is added is earlier than the Drop Below Full Course Start Date, then New Start Date,New End Date,Reason, and Remarks fields may be edited. The New Start Date cannot be less than the student's Program Start Date on the SEVIS Master component and must be later than or equal to the date on which the SEVIS Batch request is processed. The New End Date cannot be earlier than the current date, and it cannot be later than the student's Program End Date on the SEVIS Master component.
CPT Employment – Add	The student has a SEVIS Status of *Active.* Employment type is *Curricular Practical Training* on the Employment Authorizations page and no employment type exists in the SEVIS Master component. Each new Curricular Practical Training sequence number added to the Employment Authorizations page that does not exist in the SEVIS Master component results in the event being triggered.
CPT Employment – Cancel	The student has a SEVIS Status of *Active.* Employment type on the Employment Authorizations page is *Curricular Practical Training (02)* and Cancel Employment is *Y.* . *AND* The Cancel Employment value is *N* on the SEVIS Master component. *AND* Employment Start Date on the SEVIS Master component is later than the current system date.

Event	***Trigger Logic***
Dependent – Add	The student has a SEVIS Status of *Initial* or *Active.* A dependent ID exists on the most recent effective-dated I-20 form where the Relationship Status value is *Active.* *AND* The dependent ID does not exist in the SEVIS Master component.
Dependent – Cancel	The student has a SEVIS Status of *Initial.* The Dependent Relationship Status value on the most recent effective-dated I-20 form is *Cancelled.* *AND* No Termination Reason or Cancel Reason appears on the SEVIS Master Dependents page for the dependent.
Dependent – Edit	The student has a SEVIS Status of *Initial* or *Active.* A difference exists between the data in the SEVIS Master component and the following dependent data: • Last Name • First Name • Middle Name • Name Suffix • Birthdate • Sex • Birth Country • Citizenship Country • Preferred Email Address • Relationship on I-20 Dependents page
Dependent – Reactivate	The student has a SEVIS Status of *Active.* The Relationship Status value in the SEVIS Master component is *Terminated.* *AND* The Relationship Status value on the most recent effective-dated I-20 form is *Active.*

Event	***Trigger Logic***
Dependent – Reprint	This event must be manually entered on the Alerts Header page. No logic exists to trigger the event. To enter this event manually, the following conditions must be met: The student has a SEVIS Status of *Initial* or *Active.* No inactive status rows exist on the Dependents page in the SEVIS Master component. The Additional Data prompt displays initial or active status dependents from which to select. You must select the dependent ID to send the event to SEVIS.
Dependent – Terminate	The student has a SEVIS Status of *Initial* or *Active.* The Relationship Status value in the SEVIS Master component is *Active.* *AND* The Relationship Status value on the most recent effective-dated I-20 form is *Terminated.*
Disciplinary Action	This event must be manually entered on the Alerts - F/M page. No logic exists to trigger the event. To enter the event manually, the following conditions must be met: The student has a SEVIS Status of *Active.* No inactive rows exist on the Bio/Demo page of the SEVIS Master component.
Education Level – Cancel	The student has a SEVIS Status of *Active.* *AND* Two effective status active rows exist on the SEVIS Master component, Program tab. *AND* The Level of Education value on the most recent effective-dated I-20 form does not match the Level of Education value on the Initial Status SEVIS Master Program row. *OR* The From Date value on the most recent effective-dated I-20 form is different from the From Datevalue on the Initial Status SEVIS Master Program row.

Event	***Trigger Logic***
Education Level – Change	The student has a SEVIS Status of *Active.* *AND* The most recent effective-dated I-20 Level of Education value is different from the Level of Education value on the SEVIS Master component. *OR* The From Date on the most recent effective-dated I-20 form is different from the From Date value on the SEVIS Master component, and the From Date value on the current I-20 form is later than the current system date. **Note.** For F-1 students, if the Secondary Major CIP and Minor CIP fields are not populated from the academic record of the student during the alerts process, then the process enters a CIP code of *00.0000* for those fields.
Financial Info	The student has a SEVIS Status of *Initial* or *Active.* A difference exists between the data in the SEVIS Master component and the following data on the most recent effective-dated row on the I-20 form: • Months in an Academic Term • Tuition and Fees • Living Expenses • Dependent Expenses • Other Expenses • Student's Personal Funds • Funds from this School • Funds from Another Source • On Campus Employment
Off Campus Employment – Add	The student has a SEVIS Status of *Active.* Employment type is *Off-Campus* on the Employment Authorizations page and no employment type exists in the SEVIS Master component. Each new Off-Campus sequence number added to the Employment Authorizations page that does not exist in the SEVIS Master component, triggers the event.

Event	***Trigger Logic***
Off Campus Employment – Cancel	The student has a SEVIS Status of *Active.* Employment type is *Off-Campus (03)* and Cancel Employment is *Y* on the Employment Authorizations page. *OR* The Rescind Recommendation value is *Y* on the Employment Authorizations page for Off-Campus employment. *AND* Employment type is *Off-Campus* where Recommend Employment is *Y* and Rescind Recommendation is not *Y* in the SEVIS Master component.
Off Campus Employment – Edit	The student has a SEVIS Status of *Active.* *AND* Any of the following field values on the Employment Authorizations page where the employment type is *Off-Campus*, is different from the same values on the SEVIS Master component: • Start Date (greater than or equal to the day that the process runs) • End Date • Reason
OPT Employment – Add	The student has a SEVIS Status of *Active.* Employment type is *Optional Practical Training* on the Employment Authorizations page and no employment type exists in the SEVIS Master component. Each new Optional Practical Training sequence number added to the Employment Authorizations page that does not exist in the SEVIS Master component triggers the event.
OPT Employment – Cancel	The student has a SEVIS Status of *Active.* *AND* Employment type is *Optional Practical Training (01)*, and Cancel Employment is *Y* on the Employment Authorizations page. *AND* Cancel Employment is *N* on the SEVIS Master component, and the employment start date on the SEVIS Master is greater than the current system date.

Event	***Trigger Logic***
OPT Employment – Edit	The student has a SEVIS Status of *Active.* *AND* Employment Type on the Employment Authorizations page and on the SEVIS Master component is *Optional Practical Training* (01). *AND* Cancel Employment is *N* on the SEVIS Master component. *AND* The End Date or Extension End Dateon the Employment Authorizations page is greater than or equal to the system current date. *AND* If the Request Status on the Employment Authorizations page is either*Requested* or *Pending,* and any of the following field values on the Employment Authorizations page are different from the same values on the SEVIS Master component: • Start Date • End Date • Employment Code • Academic Year Met • Employer Name • Employer Address 1 • Employer Address 2 • Employer City • Employer State • Employer Postal • Completion Type *OR* If the Request Status on the Employment Authorizations page is *Approved* and any of the following field values on the Employment Authorizations page are different from the same values on the SEVIS Master component: • Employer Name • Employer Address 1 • Employer Address 2 • Employer City

Event	***Trigger Logic***
	• Employer State • Employer Postal
OPT Employment – Extend	The student has a SEVIS Status of *Active.* *AND* Employment Type on the Employment Authorizations page and on the SEVIS Master component is *Optional Practical Training* (01). *AND* Cancel Employment is *N* on the SEVIS Master component. *AND* Request Status on the Employment Authorizations page is *Approved.* *AND* Completion Type on the Employment Authorizations page is *Post Completion.* *AND* 17 Month Extension is *N* on the SEVIS Master component. *AND* 17 Month Extension is *Y* on the Employment Authorizations page.

Event	***Trigger Logic***
OPT Report Participation	The student has a SEVIS Status of *Active.* *AND* Employment Type on the Employment Authorizations page and on the SEVIS Master component is *Optional Practical Training* (01). *AND* Cancel Employment is *N* on the SEVIS Master component. *AND* Request Status on the Employment Authorizations page is *Approved.* *AND* Last Participation Reported is *Not Reported* on the SEVIS Master component and the current date is less than or equal to the 6 month report date which is the OPT Extension Start Date plus (6 months minus 15 days). The event continues to trigger until the event is sent to SEVIS or to the SEVIS Master component and the Last Participation Reported field on the SEVIS Master is *6 Month Reported.* *OR* Last participation Reported is *6 Month Reported* on the SEVIS Master component and the current date is less than or equal to the 12 month report date which is the OPT Extension Start Date plus (12 months minus 15 days). The event continues to trigger until the event is sent to SEVIS or to the SEVIS Master component and the Last Participation Reported field on the SEVIS Master component is *12 Month Reported.*

Event	***Trigger Logic***
Personal Info	The student has a SEVIS Status of *Initial* or *Active.* A difference exists between any of the following field values on the SEVIS Master component and the same field values on their originating records: Name Type (The name type to compare against is based on the name type entered as the passport name on SEVIS Setup page. That name type is used to compare the name parts in the SEVIS Master component to the Name Type on the Bio/Demo page.) • Last Name • First Name • Middle Name • Name Suffix On the Bio/Demo page: • Birthdate • Gender • Birth Country • Citizenship Country • Preferred Email Address On the Visa Permit Data/Port of Entry page, the Port of Entry Admission Number. On the I-20 form, the Commuter check box. The address type for the U.S. address is based on SEVIS Setup Address Mapping page. That address type is used to compare the U.S. address in the SEVIS master component to the Address Type on the Addresses page: • Address1 • Address2 • City • State • Postal

Event	***Trigger Logic***
Personal Info (continued)	The address type for the foreign address is based on the SEVIS Setup Address Mapping page of the SEVIS Master component. That address type is used to compare the foreign address in the SEVIS master component to the Address Type on the Addresses page: • Address1 • Address2 • City • State • Postal • Country
Program - Cancel Extension	The student has a SEVIS Status of *Active.* The student's visa type is *M-1*. *AND* The To Date on the most recent effective-dated I-20 form is the same as the original To Date on the SEVIS Master component.
Program - Defer Attendance	The student has a SEVIS Status of *Initial.* The From Date on the SEVIS Master component is earlier than the From Date on the most recent effective-dated I-20 form.

Event	***Trigger Logic***
Program - Edit	The student has a SEVIS Status of *Initial* or *Active.* *AND* A difference exists between English Proficiency Required or English Proficiency on the most recent effective dated row of the I-20 Form and SEVIS Master component. OR A difference exists between primary major CIP, secondary major CIP, or minor CIP in the SEVIS Master component and the following data on either the Student Plan/Subplan page or the Application Program Data page: Primary major, secondary major, and minor are determined by first checking the student plan or subplan, and if no data exists, taking the data from the application plan or subplan. Primary major, secondary major, and minor are determined from the SEVIS Setup page. Primary major is from the active academic plan with the minimum student career number and minimum sequence number where the plan type is equal to any of the major academic plan types on the SEVIS Setup page. Secondary major comes from the active academic plan with the second most minimum sequence number where the plan type is equal to any of the listed major academic plan types on the SEVIS Setup page. Minor uses either the academic plan or academic subplan where the plan types are equal to those entered on the SEVIS Setup page. The minor selected from the academic subplan is the minimum sequence number with the plan type indicated related to the primary major. The minor selected from academic plan is the minimum sequence number where the plan type is equal to any of the minor plan types on the SEVIS Setup page. **Note.** For F-1 students, if the Secondary Major CIP and Minor CIP field are not populated from the academic record of the students during the alerts process, then the process enters a CIP code of 00.0000 for those fields.
Program - Extension	The student has a SEVIS Status of *Active.* The To Date on the SEVIS Master component is earlier than the To Date on the most recent effective-dated I-20 form.
Program - Shorten	The student has a SEVIS Status of *Active.* The To Date on the SEVIS Master component is later than the To Date on the most recent effective-dated I-20 form.

Event	***Trigger Logic***
Registration	The student has a SEVIS Status of *Initial* or *Active.* *AND* The As of date on the Process SEVIS Alerts – F/M component is earlier than or equal to the date when the process runs. *AND* The term in the SEVIS Master component Registration page is not equal to the current term on the Process SEVIS Alerts – F/M component, or the term on the SEVIS Master Registration page is blank. *AND* The student is currently enrolled in any institution, career, or term from the Process SEVIS Alerts – F/M component. *OR* The student has a full course exception for the current term on the Process SEVIS Alerts - F/M page for the institution and career on the I-20 form. **Note.** If the Next Term (Process SEVIS Alerts – F/M page) has a start date that is later than the student's length of study To Date (I-20 Form page), then the system selects the Last Session check box on the Addl Data page (Select Alerts to Report – F/M component). This identifies the registration event as registration for the last session available within the student's allowed length of study.
Reprint	You must manually enter this event on the Alerts F/M page. There is no logic to trigger the event. The following conditions must be met to manually enter this event: • The student has a SEVIS Status of *Initial* or *Active.* • Reprint Reason is *Required* on the Additional Data page.

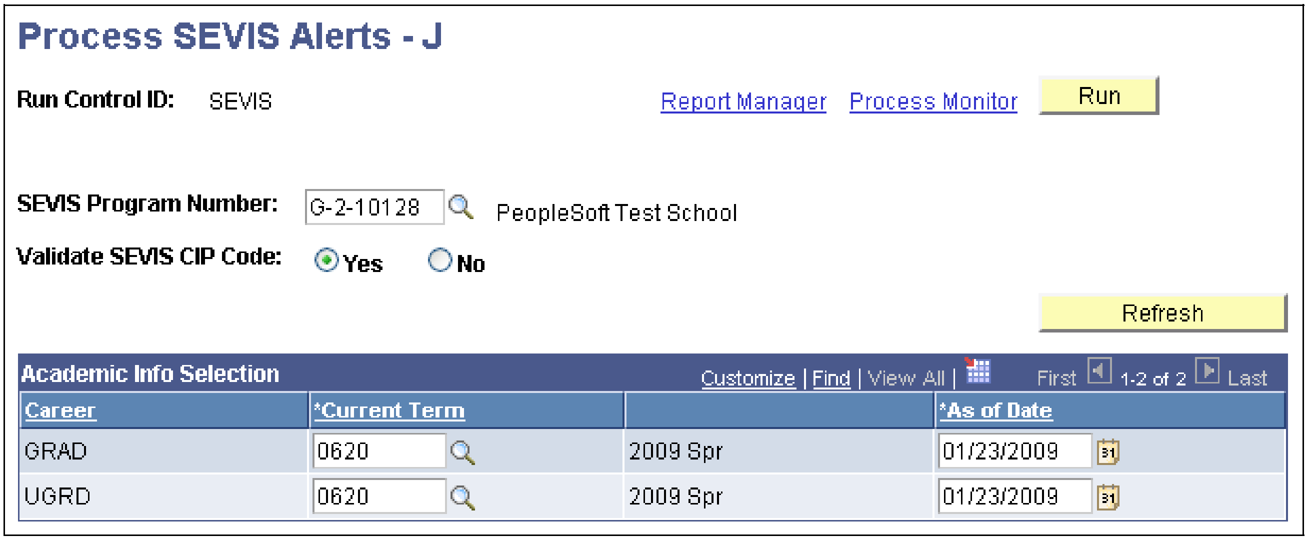
Event	***Trigger Logic***
Request Cap – Gap Extension	The student has a SEVIS Status of *Active.* *AND* The Program End Date on the SEVIS Master component is less than or equal to the system current date. *AND* The SEVIS Master component Cap-Gap Status field is blank and the I-20 Form Cap-Gap Status field is populated. *OR* The SEVIS Master component Cap-Gap Status field is different than the Cap-Gap Statusvalue on the current effective-dated I-20 Form row.
Status - Cancel	The student has a SEVIS Status of *Initial.* *AND* A cancel reason exists on the most recent effective-dated I-20 form. *AND* No cancel reason exists on the SEVIS Master component.

Event	***Trigger Logic***
Status - Complete	The student has a SEVIS Status of *Active.* *AND* The Program Action is *COMP* (complete program) on Student Program/Plan for the program on the I-20 form, and the student degree term end date for Completion Term is earlier than or equal to current date and no OPT employment exists where the OPT end date is later than the current date. *OR* The I-20 To date plus the number of days in the M Students or F Students field (as appropriate) on the Process SEVIS Alerts – F/M Run Control page is earlier than or equal to the current date and no OPT employment exists where the OPT end date is later than the I-20 to date. *OR* If the OPT end date is later than the I-20 to date and the OPT end date plus the number of days in the M Students or F Students field, as appropriate, on the Alerts – F/M Run Control page is earlier than or equal to the current date. *OR* If the OPT extension end date is later than the I-20 to date or the OPT end date and the OPT extension end date plus the number of days in the M Students or F Students field, as appropriate, on the Alerts – F/M Run Control page is earlier than or equal to the current date. **Note.** The event will not trigger based on the I-20 to date, the OPT end date, or the OPT extension end date if the M Students or F Students field is blank on the Process SEVIS Alerts— F/M Run Control page. However, the event will trigger if Program Action is *COMP* and the M Students or F Students field is blank. You can manually trigger this event.

Event	***Trigger Logic***
Status - Terminate	The student has a SEVIS Status of *Initial* or *Active.* Program Action is *DISC,DISM,WADM, SPND,LEAV,* or *ADRV* on the Student Program page for the institution, career, and program in the SEVIS Master component. *AND* None of the program actions exist in the SEVIS Master component. *AND* The student has no OPT employment, or the end date of the OPT employment is earlier than or equal to the effective date of the program action. *OR* Program Action is *WADM,WAPP,* or *ADRV* on the Application Program Data page for the institution, career, and program in the SEVIS Master component. *AND* None of the program actions exist in the SEVIS Master component. *AND* The student has no OPT employment or the end date or extension end date of the OPT employment is earlier than or equal to the effective date of the program action. You can manually enter this event on Alerts - F/M. **Note.** Entering both a Cancellation Reason on the I-20 Form and a Program Action of *WADM,WAPP,* or *ARDV* on the Application Program Data page triggers the Status - Cancel event, but it does not trigger the Status - Termination event.
Status - Verify	The student has a SEVIS Status of *Active.* *AND* The most recent effective-dated row from the SEVIS Master component is 180 days (6 months) less than the current system date.

Running the SEVIS Alerts Process for J Visas

Access the Process SEVIS Alerts - J page (Campus Community, SEVIS, J Alerts, Process SEVIS Alerts - J).



Process SEVIS Alerts - J page

The SEVIS Alerts process detects changes to your international exchange visitor population that should be reported to SEVIS. A unique batch ID is generated each time the process runs. The naming scheme for this batch ID is YYYYMMDD-NNNNN, where YYYYMMDD represents the date on which the process runs and NNNNN represents the unique counter number. For example, the batch ID 20041219-00001 indicates that the process was run on December 19, 2002 and 00001 is the unique counter number. This batch ID and the SEVIS program number are keys to the records that you review on the Alerts Header page in the Select Alerts to Report - J component.

Warning! All reportable institutions and careers for the SEVIS program number must appear on this page or the data will not be reported to SEVIS.

SEVIS Program Number

Enter the SEVIS program number for the process you want to run.

Validate SEVIS CIP Code

Select *Yes* for the alerts process to compare CIP codes against the corresponding CIP Code Table page (Set Up SACR, Foundation Tables, Reporting Codes, CIP Code Table). When the Valid SEVIS CIP Code field on the CIP Code Table page is set to *Yes*, the process compares the code in the event against the valid code on the table. If the codes do not match, or if no valid code is available for comparing (the Valid SEVIS CIP Code on the CIP Code Table page is set to *No),* the process generates an error message that appears in the alerts.

The validation process checks for valid CIP codes for these J events:

- Create Exchange Visitor
- Program – Edit Subject

Select *No* to disable the automatic CIP code validation process. When the validation process is disabled, no validation notices appear in the alerts.

Refresh

Click to refresh the page with data retrieved for the specified program number.

Academic Information Selection

Institution

The Institution field appears only if more than one institution is mapped to the SEVIS program number.

You cannot edit the institution on this page. You must make valid changes for the SEVIS program number on the SEVIS Program Sponsor Table page.

Career

The system displays the career when you click Refresh. You cannot edit the career on this page. You must make valid changes for the SEVIS program number on the SEVIS Program Sponsor Table page.

Current Term

Enter the current term for each institution and career listed.

The current term appears by default if the system date is between the term begin and end dates, and only one term is defined for the institution and career within those dates.

The current term value is used for the Validate event for student category exchange visitors.

As of Date

Enter the date for each institution and career listed.

The Validate event is triggered for student category exchange visitors based on this date.

Update this field each time the *Current Term* field is refreshed.

When you have entered the data, click *Run* to run the process.

Note. A warning message appears if the process has been run in the past 12 hours. If any of the process's work was in progress when the SEVIS Alerts process for J visas runs again within that time period, you might lose the results of that work.

This table lists, by event, what must happen for an event to appear on the Alerts Headers page for an exchange visitor. Unless otherwise noted, all update events in the table are for active status exchange visitors.

Events	***Trigger Logic***
Create Exchange Visitor	The exchange visitor has a Visa Type on the Visa Permit Data page is *SEVIS Visa Type 03* (J-1) where the Country is *USA.* *AND* Status is *Active* on the most recent effective-dated DS-2019 form. *AND* Funding Verified is *Y* on the most recent effective-dated DS-2019 form. *AND* The reason code is provided if Country of Birth is *US* or *US Territory*. *AND* No rows exist for ID and Program Sponsor on the DS-2019 form in the SEVIS Master component.
Selection Criteria for All Events Listed Below	The exchange visitor's immigration status in port of entry data is *SEVIS Visa Type 03* (J-1). *OR* If the Immigration Status field is blank on the Port of Entry Data page, the exchange visitor's visa type on the Visa Permit Data page is *SEVIS Visa Type 03* (J-1) where the Country is USA. *AND* Effective Status is *Active.* on the most recent effective-dated DS-2019 form. *AND* Funding Verified is *Y* on the most recent effective-dated DS-2019 form. *AND* SEVIS Status on the SEVIS Master component is *Initial, Inactive* or *Active.*

<table>
<tr><th>Events</th><th>Trigger Logic</th></tr>
<tr><td>Biographical</td><td>The exchange visitor has a SEVIS Status of Initial or Active.

A difference exists between any of the following fields on SEVIS Master component and the same fields on their originating records:

The Name Type to compare against is based on the Name Type entered as the Passport Name on SEVIS Setup page. Name Type is used to compare the name parts in the SEVIS Master component to the Name Type on the Bio/Demo page.

• Last Name
• First Name
• Middle Name
• Name Suffix

On the Bio/Demo page:

• Birthdate
• Sex
• Birth Country
• Birth Location

Address Type for the U.S. address is based on the SEVIS Setup Address Mapping page. Address Type is used to compare the U.S. address in the SEVIS Master component to the Address Type on the Addresses page:

• Address1
• Address2
• City
• State
• Postal

Most recent effective-dated row on the DS-2019 for:

• Permanent Residence Country
• Position Code
• Citizenship Country
• Birth Country Reason</td></tr>
</table>

Events	***Trigger Logic***
Dependent – Add	The exchange visitor has a SEVIS Status of *Initial* or *Active.* A dependent ID exists on the most recent effective-dated DS-2019 form where the relationship status is *Active* *AND* The dependent ID does not exist in the SEVIS Master component.
Dependent – Delete	The exchange visitor has a SEVIS Status of *Initial.* The relationship status in the SEVIS Master component is *Active.* *AND* The relationship status on the most recent effective-dated DS-2019 form is *Deleted.*
Dependent – Edit	The exchange visitor has a SEVIS Status of *Initial* or *Active.* For each dependent listed in the SEVIS Master component, a difference exists between the data on SEVIS Master component and the following data: • Last Name • First Name • Middle Name • Name Suffix • Birthdate • Birth Location • Sex • Birth Country • Citizenship Country • Relationship (on DS-2019 form) • Permanent Residence Country (on DS-2019 form) • Birth Country Reason (on DS-2019 form)
Dependent – End Status	The exchange visitor has a SEVIS Status of *Active.* The relationship status on the most recent effective-dated DS-2019 Form is *Ended Status* and an end status reason is provided. *AND* The relationship status for the dependent ID on SEVIS Master component is *Active.*

Events	***Trigger Logic***
Dependent – Reprint	This event must be manually entered on the Alerts Header page. No logic exists to trigger the event. The following conditions must be met to manually enter this event: • The exchange visitor has a SEVIS Status of *Active.* • No inactive status rows exist on the SEVIS Master Dependents page. • Dependents with *Initial* or *Active* status are available from the Additional Data prompt list. You must select the dependent ID to send the event to SEVIS.
Dependent – Terminate	The exchange visitor has a SEVIS Status of *Active.* The relationship status in the SEVIS Master component, Dependents page is *Active.* *AND* The relationship status on the most recent effective-dated DS-2019 form is *Terminated* and a termination reason is provided.

Events	***Trigger Logic***
Financial Info	The exchange visitor has a SEVIS Status of *Initial* or *Active.* A difference exists between the data on the SEVIS Master component and the following data on the most recent effective-dated row on the DS-2019 form: • Received U.S. Gov Funds • Current Program Sponsor • GovtOrg1 • GovtOrg1Amount • GovtOrg2 • GovtOrg2Amount • InternatOrg1 • InternatOrg1Amount • InternatOrg2 • InternatOrg2Amount • EV Govt • Binational Commission • Other Org • Personal Funds
Program – Amend	The exchange visitor has a SEVIS Status of *Initial.* The Start Date on the SEVIS Master component is different from the Start Date on the most recent effective-dated DS-2019 form. *OR* The End Date on SEVIS Master is different from the End Date on the most recent effective-dated DS-2019 form.

Events	***Trigger Logic***
Program – Edit Subject	The exchange visitor has a SEVIS Status of *Initial* or *Active.* *AND* If the Program Category on most recent dated DS-2019 row is *1a,1b,1c,1d,1e,* or *1f.* *AND* A difference exists between the Subject Field code on the SEVIS Master component and the minimum sequence number on Student Plan where the Plan Type equals any of the plan types defined on the SEVIS Setup for the Institution and Career page of the student exchange visitor. *OR* If the Program Categoryis not *1a,1b,1c,1d,1e,* or *1f.* *AND* A difference exists between the Subject Field code on the SEVIS Master component and the Subject Field code on the most recent effective-dated DS-2019 form. *OR* If Visitor's Category on the DS-2019 Form is *Student Intern* (1G), and a difference exists between the Foreign Degree Level on the SEVIS Master component and the Foreign Degree Level on the most recent DS-2019 row. *OR* If Visitor's Category on the DS-2019 Form is *Student Intern* (1G), and a difference exists between the Foreign Field of Study on the SEVIS Master component and the Foreign Field of Study on the most recent DS-2019 row. **Note.** For compare processing, the alerts process strips out all blanks and spaces from the Foreign Degree Level and Foreign Field of Study fields and converts the data to all upper case.
Program – Extension	The exchange visitor has a SEVIS Status of *Active.* The End Date on SEVIS Master is less than the End Date on the most recent effective-dated DS-2019 form.

Events	***Trigger Logic***
Program - Matriculate	The exchange visitor has a SEVIS Status of *Active.* The Visitor Category on the SEVIS Master component is different from the Visitor Category on the most recent effective dated DS-2019 Form when any of the following scenarios occur: • Student Associate to Student Bachelors • Student Associate to Student Masters • Student Associate to Student Doctorate • Student Bachelors to Student Master • Student Bachelors to Student Doctorate • Student Master to Student Doctorate
Program – Shorten	The exchange visitor has a SEVIS Status of *Active.* The End Date on the most recent effective-dated DS-2019 form is earlier than the End Date on the SEVIS Master component.
Reprint	The exchange visitor has a SEVIS Status of *Active.* This event must be manually entered on the Alerts Header page. No logic exists to trigger the event.
Site of Activity – Add	The exchange visitor has a SEVIS Status of *Initial* or *Active.* A Site of Activity with a status of *Active* exists on the most recent effective-dated DS-2019 form that does not exist on SEVIS Master component.
Site of Activity – Delete	The exchange visitor has a SEVIS Status of *Initial.* A Site of Activity with a status of *Inactive* exists on the most recent effective-dated DS-2019 form and the same Site of Activity has a status of *Active* on the SEVIS Master component.
Site of Activity – Edit	The exchange visitor has a SEVIS Status of *Initial* or *Active.* Address 1,Address 2,City,State, and Postal fields for each active Site of Activity on the most recent effective-dated DS-2019 form are different from any of the same fields on the SEVIS Master component. *OR* The name on the most recent effective-dated row on the Site of Activity table is not equal to the name on the SEVIS Master.

Events	***Trigger Logic***
Status – Correct Infraction	The exchange visitor has a SEVIS Status of *Active* or *Inactive.* This event must be manually entered on the Alerts Header page. No logic exists to trigger the event.
Status – End	The exchange visitor has a SEVIS Status of *Active.* If Program Category on the most recent effective-dated DS-2019 row equals *1a,1b,1c,1d,1e,* or *1f.* Student Program program action is *Complete Program (COMP)* for the institution, career, and student career number on the SEVIS Master component, and the program action on the SEVIS Master component is not equal to *Complete Program.* **Note.** You can also enter this event manually on the Select Alerts to Report - J component for all exchange visitor categories.
Status - Invalid	This event must be manually entered on the Alerts Header page. No logic exists to trigger the event. The following conditions must be met to manually enter this event: • The exchange visitor has a SEVIS Status of *Initial.* • No inactive status rows exist on the SEVIS Master Bio/Demo and Employment/SOA pages.
Status - No Show	This event must be manually entered on the Alerts Header page. No logic exists to trigger the event. The following conditions must be met to manually enter this event: • The exchange visitor has a SEVIS Status of *Initial.* • No inactive status rows exist on the SEVIS Master Bio/Demo and Employment/SOA pages.
Status - Terminate	This event must be manually entered on the Alerts Header page. No logic exists to trigger the event. The following conditions must be met to manually enter this event: • The exchange visitor has a SEVIS Status of *Inactive* or *Active.* • No inactive status rows exist on the SEVIS Master Bio/Demo and Employment/SOA pages.

Events	***Trigger Logic***
Validate	The exchange visitor has a SEVIS Status of *Initial.* The As of Date on the Process SEVIS Alerts - J run control page is the same as or earlier than the current date. *AND* The exchange visitor has a term activation row for the current term on the Process SEVIS Alerts - J page where the institution and career equals the data on Term Activation. **Note.** Manually enter this event on the Alerts Header page of the Select Events to Report - J component if the exchange visitor is in a nonstudent program category.

Viewing SEVIS Alerts Process Data

Use pages in the Select Alerts to Report - F/M or Select Alerts to Report - J component to review the events triggered for each student or exchange visitor after running the SEVIS Alerts process for the specific visa type.

The SEVIS school code for F/M visas or the SEVIS program code for J visas and batch ID information are keyed to the data on the Alerts Header page in the component. The batch ID is a unique number generated by the SEVIS Alerts process. Access to the component is controlled through program code or school code security respectively. By using the SEVIS program code or school code and batch ID, you are able to review errors, enter additional data, and indicate if the event should be submitted to SEVIS or to the SEVIS Master component. You can also indicate if a new I-20 is needed for the student or a new DS-2019 form is needed for the exchange visitor.

On the Alerts Headers page, default values appear for the New Form and Send To fields according to the values defined on the SEVIS Event Types page. The system displays these default values only if the event has no errors.

Set the Send To field on the Alerts Header page to *Master* to update the event in the SEVIS Master component, or set the field to *None* to prevent processing the event until you can evaluate errors and determine whether to send it to SEVIS or update the SEVIS Master component.

Note. The system automatically sets the Send To field on the Alerts Header page to *SEVIS* when the Send to SEVIS check box is selected for the event type on the SEVIS Event Types page and when no errors are detected during processing and no additional data is required. Only rows set to send to *SEVIS* on the Alerts Header page are extracted to the XML file to send to SEVIS.

Clicking Set All "Send To" to SEVIS sets the Send To field to *SEVIS* for all events where no errors exist and additional data is required.

After reviewing and correcting events data in the Select Alerts to Report component, run the Export SEVIS Events process to create the XML file to send to SEVIS or to update the SEVIS Master component before running the SEVIS Alerts process for that visa type again. Refer to the process flow at the beginning of this document to better understand when to run this process.

Note. Data entered on the Additional Data page in the Select Alerts to Report component is lost if the Export SEVIS Events process is not run before the SEVIS Alerts process is run again for that visa type.

This section discusses how to:

- Select data to review.
- Review alerts data.
- Enter additional data for an event.
- View event errors data.

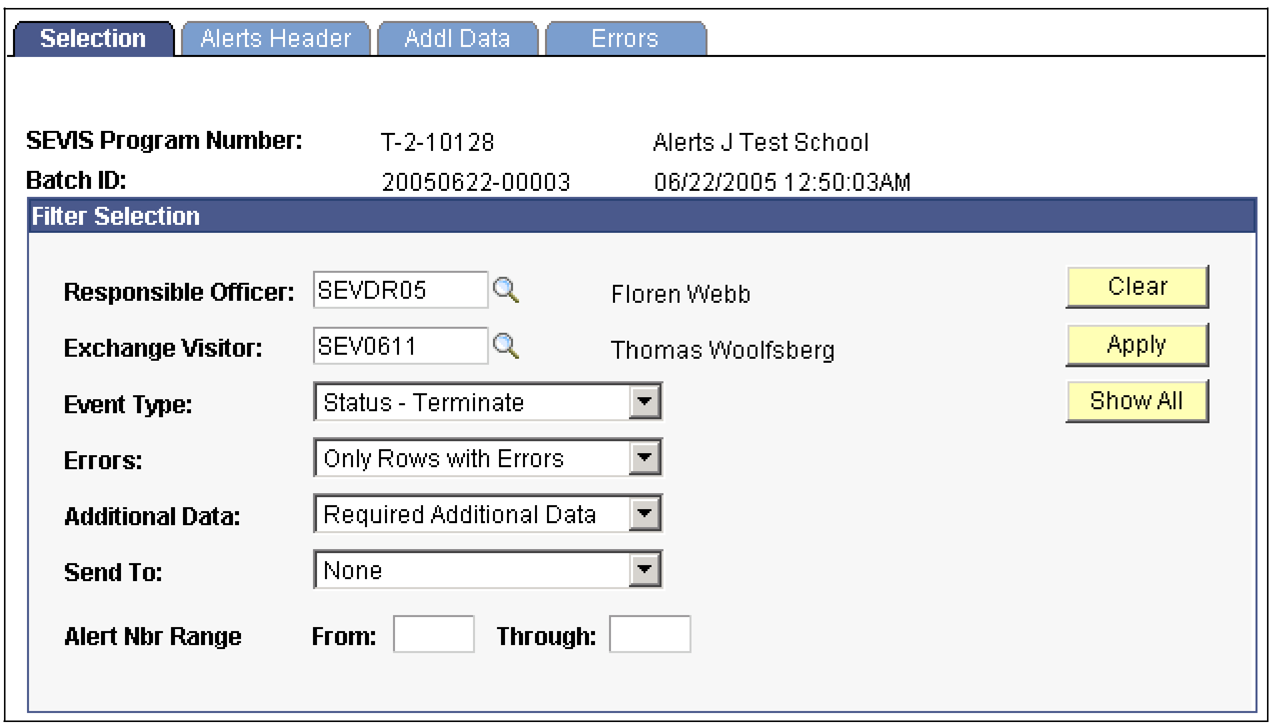
Pages Used to View SEVIS Alerts Process Data

Page Name	***Definition Name***	***Navigation***	***Usage***
Selection	SEV_REV_U_FILTER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Selection • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Selection	Select data to review.
Alerts Header	SEV_ALERT_HEADER	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Alerts Header • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Alerts Header	Review data on alerts page.
Addl Data (additional data)	SEV_REV_FMUPD	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Addl Data • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Addl Data	Enter any additional data required for this event.

Page Name	***Definition Name***	***Navigation***	***Usage***
Errors	SEV_REV_U_ERRORS	• Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Errors • Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Errors	View event errors.
Message Explanation	SEV_REV_ERR_EXPL	Click More on the Errors page.	Review the error message information.

Selecting Data to Review

Access the Selection page (Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Selection).



Selection page

SEVIS School Code or **SEVIS Program Number**

The system displays either the SEVIS School Code and associated fields for F and M visas, or the SEVIS Program Number and associated fields for J visas.

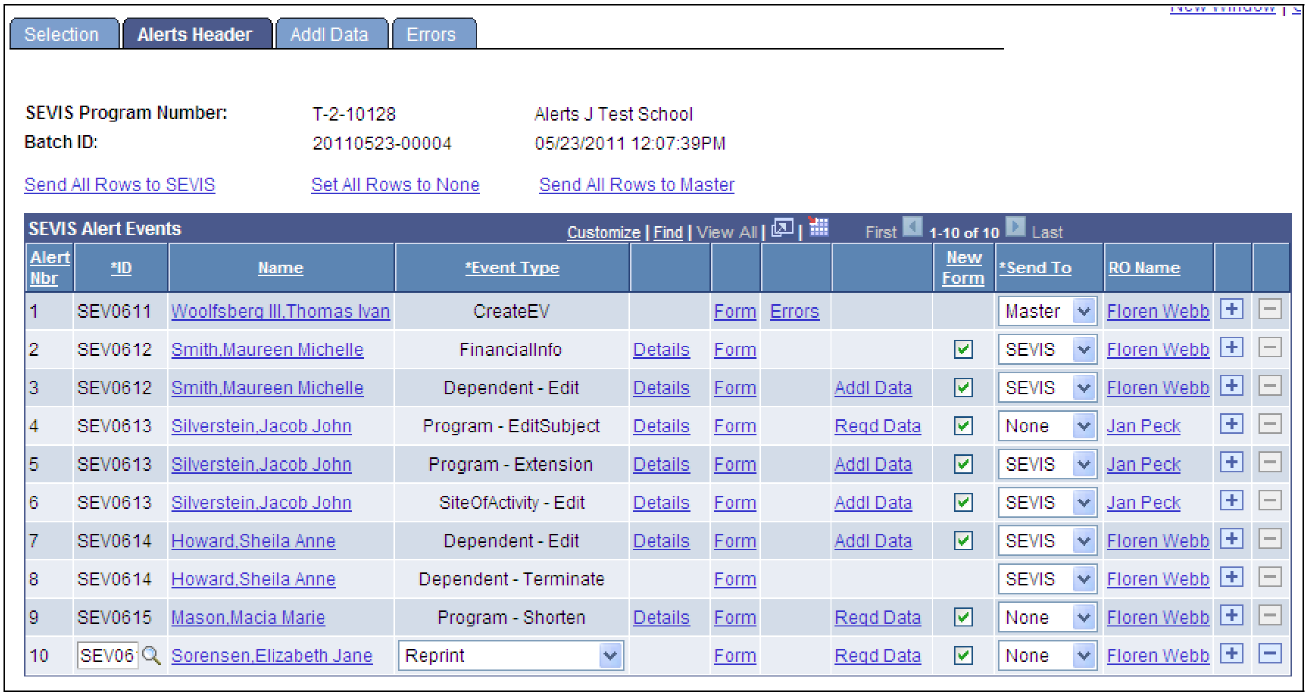
Filter Options

If you have a large number of events to view, you can filter the data based on options in this area.

School Official or **Responsible Officer**	For the F and M visas school official, enter the DSO assigned to the students who appear on the Alerts Header page. The prompt displays all DSOs defined on the SEVIS School Code Table page for the SEVIS school code listed. For the J visas responsible officer, enter the RO/ARO assigned to the exchange visitors who appear on the Alerts Header page.
Student ID or **Exchange Visitor**	For the F and M visas student ID, enter the student's ID (EmplID) whose events you want to review. For the J visas exchange visitor, enter the exchange visitor's ID (EmplID) whose events you want to review. The prompt displays all IDs that have events.
Event Type	Select a specific event to review.
Errors	Select to review events that have errors or events that have no errors.
Additional Data	Select to review events requiring additional data or events that require no further editing.
Send to SEVIS	Select to review events that have no additional data, or that have optional or required additional data.
Alert Nbr Range (alert number range)**From** and **Through**	The system assigns a unique alert number to each event row for each Batch ID. Select an alert number range to review only the events within the range.
Clear	Click to clear the data in theFilter Options group box.
Apply	Click to filter the alerts results based on the data entered in the Filter Options group box.
Show All	Click to show all of the events on the Alerts Header page.

Reviewing Alerts Data

Access the Alerts Header page. (For F/M alerts, Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Alerts Header. For J alerts, Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Alerts Header.)



Alert Nbr	*ID	Name	*Event Type					New Form	*Send To	RO Name
1	SEV0611	Woolfsberg III,Thomas Ivan	CreateEV		Form	Errors			Master	Floren Webb
2	SEV0612	Smith,Maureen Michelle	FinancialInfo	Details	Form			☑	SEVIS	Floren Webb
3	SEV0612	Smith,Maureen Michelle	Dependent - Edit	Details	Form		Addl Data	☑	SEVIS	Floren Webb
4	SEV0613	Silverstein,Jacob John	Program - EditSubject	Details	Form		Reqd Data	☑	None	Jan Peck
5	SEV0613	Silverstein,Jacob John	Program - Extension	Details	Form		Addl Data	☑	SEVIS	Jan Peck
6	SEV0613	Silverstein,Jacob John	SiteOfActivity - Edit	Details	Form		Addl Data	☑	SEVIS	Jan Peck
7	SEV0614	Howard,Sheila Anne	Dependent - Edit	Details	Form		Addl Data	☑	SEVIS	Floren Webb
8	SEV0614	Howard,Sheila Anne	Dependent - Terminate		Form				SEVIS	Floren Webb
9	SEV0615	Mason,Macia Marie	Program - Shorten	Details	Form		Reqd Data	☑	None	Floren Webb
10	SEV06	Sorensen,Elizabeth Jane	Reprint		Form		Reqd Data	☑	None	Floren Webb

Alerts Header page

The Alerts Header page lists the events that will trigger when the Process SEVIS Alerts process runs for the specific visa type.

If the Send To SEVIS check box on the SEVIS Event Types page is selected for the event type, and the event has no errors, the system sets the Send To value to *SEVIS,* and the Extract SEVIS process includes the event in the XML file to send to SEVIS. If the Form Request Available check box on the SEVIS Event Types page is selected, the system also displays the New Form check box already selected on the Alerts Header page to request a new I-20 for F and M visas or a new DS-2019 form for J visas. You can change the default Send To value for each event.

The Extract SEVIS process does not include events set to *Master* or *None* in the XML file to send to SEVIS.

When the Send To field is set to *Master* (for Master Sync), the Alerts process synchronizes the event data by directly uploading it to the appropriate fields on the active effective status row in the SEVIS Master component, and the Extract SEVIS process updates the SEVIS Status value if needed.

For Create Student for F and M visas or Create EV events for J visas set to *Master*, the Alerts process inserts new active status rows in the SEVIS Master component, and the Extract SEVIS process sets the SEVIS Status to *Initial.* This enables you to update the SEVIS Master component with data entered manually in SEVIS RTI.

Note. If you set the Send To field to *Master* for a Create Student, Create EV, or Dependent - Add event types, you must manually enter the SEVIS ID for the student or exchange visitor and their dependents on the SEVIS ID Maintenance page.

When errors occur, the SEVIS Alerts process sets the Send To field to *None.* You can change it to *Master* to send the event without clearing the errors. Review the errors before changing it. Correct errors as necessary, and run the Alerts process for that visa type again to trigger the events with no errors before updating the SEVIS Master directly.

An example of when you might want to change *None* to *Master* for F and M visas without correcting the data is when the error occurs because the From date is not later than or equal to the current system date for an initial creation Create Student event. The student might have been created in RTI in the past and you need to reflect the dates as they appear in RTI, and therefore the error is acceptable.

An example of when you might want to change *None* to *Master* for J visas without correcting the data is when the error occurs because the Start date is not later than or equal to the current system date for Create EV event. The exchange visitor might have been created in RTI in the past and you need to reflect the dates as they appear in RTI, and therefore the error is acceptable.

You can add a row to manually enter an event for a student or exchange visitor if the Allow Manual Addition check box is selected for the event type on the SEVIS Event Types page and the student has a SEVIS ID for the specified school code or the exchange visitor has a SEVIS ID for the specified program code.

When the SEVIS Alerts process for the visa type runs, it moves all events with no errors to the View SEVIS Events History component.

SEVIS School Code or **SEVIS Program Number**

The page displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas.

Send All Rows to SEVIS

Click to set all the Send To fields to *SEVIS* for all events with no errors and for which no additional data is required.

Only events that have no errors and need no additional data can be changed.

Set All Rows to None

Click to set all of the Send To fields to *None,* preventing them from being submitted to SEVIS during the Extract process.

Send All Rows to Master

Click to set all the Send To fields to *Master* for all events for which no additional data is required.

SEVIS Alert Events

Name

Click the name to access the individual's Bio/Demo Data page in update/display mode.

The page opens in a new window.

Details

This link is available only when the Compare Detail check box on the SEVIS Event Types page, Event Defaults tab, is selected for the event type

Click to access the Compare Detail page where you can view the changes in data that triggered the event.

Form

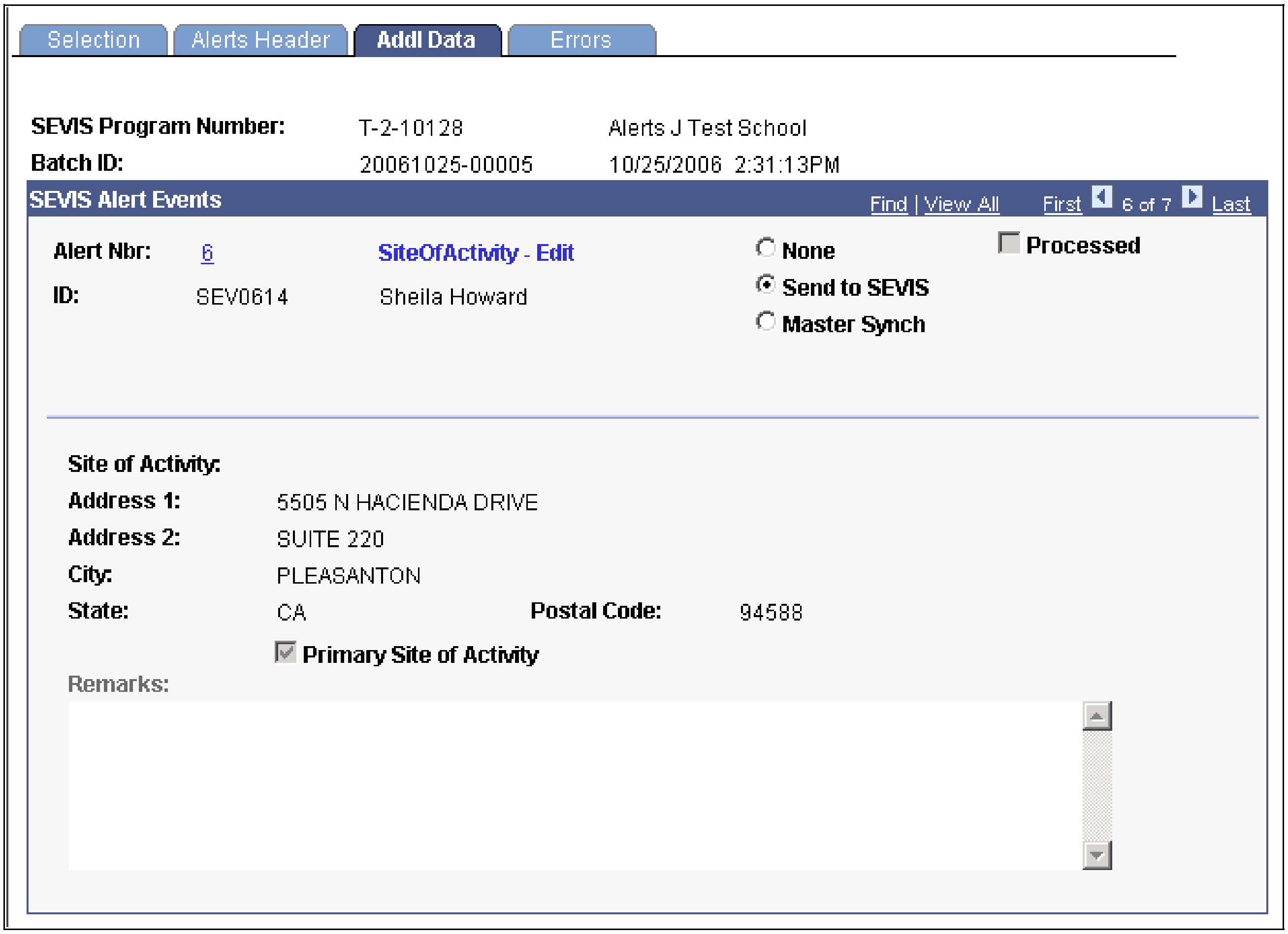
Click the link to open the I-20 form for F and M visas or the DS-2019 form for J visas in update/display mode.

The form opens in a new window.

Errors	Appears only if errors are detected. Click the link to access the Errors page. You must correct errors and run the Alerts Process for that visa type again to be able to set the Send to field to *SEVIS.* You can select *Master* without clearing the errors.
Addl Data (additional data) or **Reqd Data** (required additional data)	If the Addl Data link appears, additional data is optional. Select the link to access the Additional Data page where you can enter the data. If the Reqd Data link appears, additional data is required. Select the link to access the Additional Data page where you must enter values in the required fields before you can set the Send To field to either *Master* or *SEVIS.* No link appears if no additional data is permitted or required. For a list of the event types that have required or optional additional data, refer to the description of the Addl Data field on the SEVIS Event Types page.
New Form	The system requests a new I-20 form for F and M visas or a new DS-2019 form for J visas if the event has no errors and if the New Form check box for the event type is selected on the SEVIS Event Types page. You can override the default value.
Send to	Select *Master* to update the SEVIS Master component directly with data already entered in the SEVIS RTI. The SEVIS Extract process for the visa type does not include events set to *Master* in the XML file to send to SEVIS. Select *SEVIS* to include the event in the XML file to send to SEVIS. The system automatically displays *SEVIS* if the event has no errors and the Send To SEVIS check box for the event type is selected on the SEVIS Event Types page. Select *None* to prevent the process from updating the SEVIS Master component with the event data or from including the event in the XML file.
DSO Name or **RO Name**	For F and M visas, the system displays the name of the DSO listed on the most recent I-20 form, and for J visas the system displays the name of the RO listed on the most recent DS-2019 form. Select the name to view a list of DSOs or ROs. If a different DSO or RO is responsible for this event, select the correct one to include in the XML file to send to SEVIS.

Entering Additional Data for an Event

Access the Addl Data page. (For F/M visas, Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Addl Data. For J visas, Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Addl Data.)



Addl Data (additional data) page

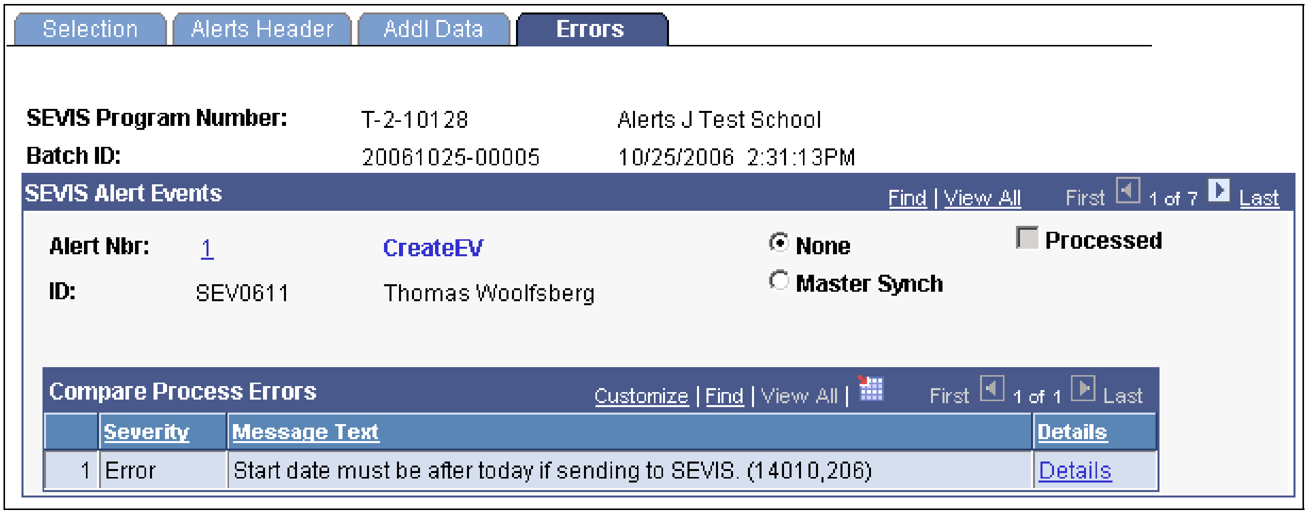
Fields and data on this page change based on the event type.

The options of *None*,*Send to SEVIS*, and *Master Synch* appear based on the value set in the Send To field on the Alerts Header page. If additional data is required data, than you must enter it before you can select *Send to SEVIS* or *Master Synch* and save the page.

For a list of the event types that have required or optional additional data, refer to the SEVIS Event Types page, Addl Data field description.

Viewing Event Errors Data

Access the Errors page. (For F/M visas, Campus Community, SEVIS, F/M Alerts, Select Alerts to Report - F/M, Errors. For J visas, Campus Community, SEVIS, J Alerts, Select Alerts to Report - J, Errors.)



Errors page

The Errors page lists data errors detected by the Alerts process for the event. You must correct the data error before the event can be included in the XML file to send to SEVIS. However, you can choose to ignore the error for Master Sync and set the Send To field on the Alerts Header page to *Master.* Most errors indicate that required data is missing for the student or exchange visitor, or the dependent. If data is missing for a dependent, the ID of the dependent is listed in the error. Consult the U.S. Immigrations and Customs Enforcement web site for a listing of required fields by event.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

Select the More link to view additional detail regarding the error.

Viewing Event History Information

The system provides a listing by ID of each event from the Select Alerts to Report components that did not contain errors. This provides a historical tracking of the events triggered by the Process SEVIS Alerts process for the visa type and the events submitted to SEVIS. You can view the data sent to SEVIS and the results of the processing by SEVIS.

This section discusses how to:

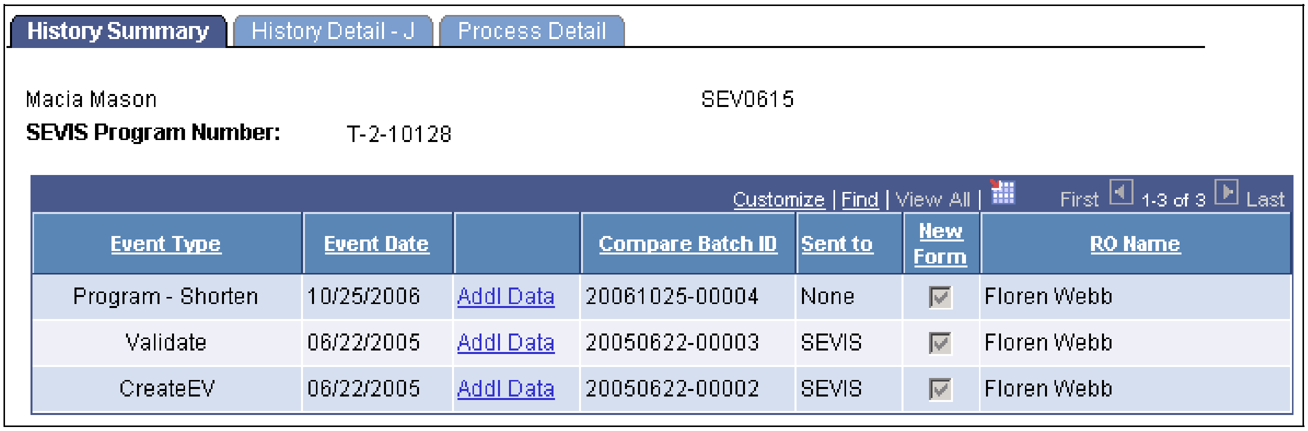
- View the event history summary.
- View event history detail information.
- View event process details.

Pages Used to View Event History Information

Page Name	*Definition Name*	*Navigation*	*Usage*
History Summary	SEV_HIST_SUMMARY	Campus Community, SEVIS, View SEVIS Events History, History Summary	View a listing of events without errors that have triggered for a student or exchange visitor.
History Detail - F/M	SEV_HIST_DETAIL	Campus Community, SEVIS, View SEVIS Events History, History Detail - F/M	View the data for each event for F and M visa holders.
History Detail - J	SEV_HIST_DETAIL_EV	Campus Community, SEVIS, View SEVIS Events History, History Detail - J	View the data for each event for J visa holders.
Details	SEV_HST_I_CRE_SEC	Click the More link on the History Detail - F/M or the History Detail - J page.	View additional data from the event.
SEVIS Alerts Addresses	SEV_REV_U_ADD_SEC	Click the Addr Info link on the History Detail - F/M or the History Detail - J page.	View address data related to the event.
Process Detail	SEV_HIST_DWN_RSLT	Campus Community, SEVIS, View SEVIS Events History, Process Detail	View the results of the processing by SEVIS.

Viewing the Event History Summary

Access the History Summary page (Campus Community, SEVIS, View SEVIS Events History, History Summary).


History Summary | History Detail - J | Process Detail

Macia Mason SEV0615

SEVIS Program Number: T-2-10128

Customize | Find | View All | First 1-3 of 3 Last

Event Type	Event Date		Compare Batch ID	Sent to	New Form	RO Name
Program - Shorten	10/25/2006	Addl Data	20061025-00004	None	☑	Floren Webb
Validate	06/22/2005	Addl Data	20050622-00003	SEVIS	☑	Floren Webb
CreateEV	06/22/2005	Addl Data	20050622-00002	SEVIS	☑	Floren Webb

History Summary page

All events on the SEVIS Alerts page that do not have errors are listed here. The history summary data is populated each time the Process SEVIS Alerts process for the visa type is run. The date when the event is triggered, the batch ID, and the DSO assigned to the student on the I-20 form for F and M visas or the RO/ARO assigned to the exchange visitor on the DS-2019 for J visas, appear along with the additional information listed here.

SEVIS School Code or **SEVIS Program Number**

The system displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas.

Addl Data (additional data)

You can click this link to access the History Detail page where you can view the data extracted for the event.

From the History Summary page for F and M visas, the link takes you to the History Detail - F/M page.

From the History Summary page for J visas, the link takes you to the History Detail - J page.

File Error

Appears only if an error is received from SEVIS.

Click this link to view the error information generated during processing the event and received from SEVIS.

Sent to

Displays the destination where the data was sent: *SEVIS*,*Master*, or *None*.

New Form

The system selects this check box if a new form was requested for the event

Viewing Event History Detail Information

If you ran the Process SEVIS Alerts - F/M process, access the History Detail - F/M page(Campus Community, SEVIS, View SEVIS Events History, History Detail - F/M).

If you ran the Process SEVIS Alerts - J process, access the History Detail - J page (Campus Community, SEVIS, View SEVIS Events History, History Detail - J).

History Detail - J page

You can view the data that was submitted for the event listed. The data varies depending on the event.

Consult the U.S. Immigrations and Customs Enforcement web site for a listing of data elements sent for each event.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

More

This link appears only for the F and M visas Create Student event.

Click this link to access the Details page where you can view additional data extracted for the event.

Addr Info (address information)

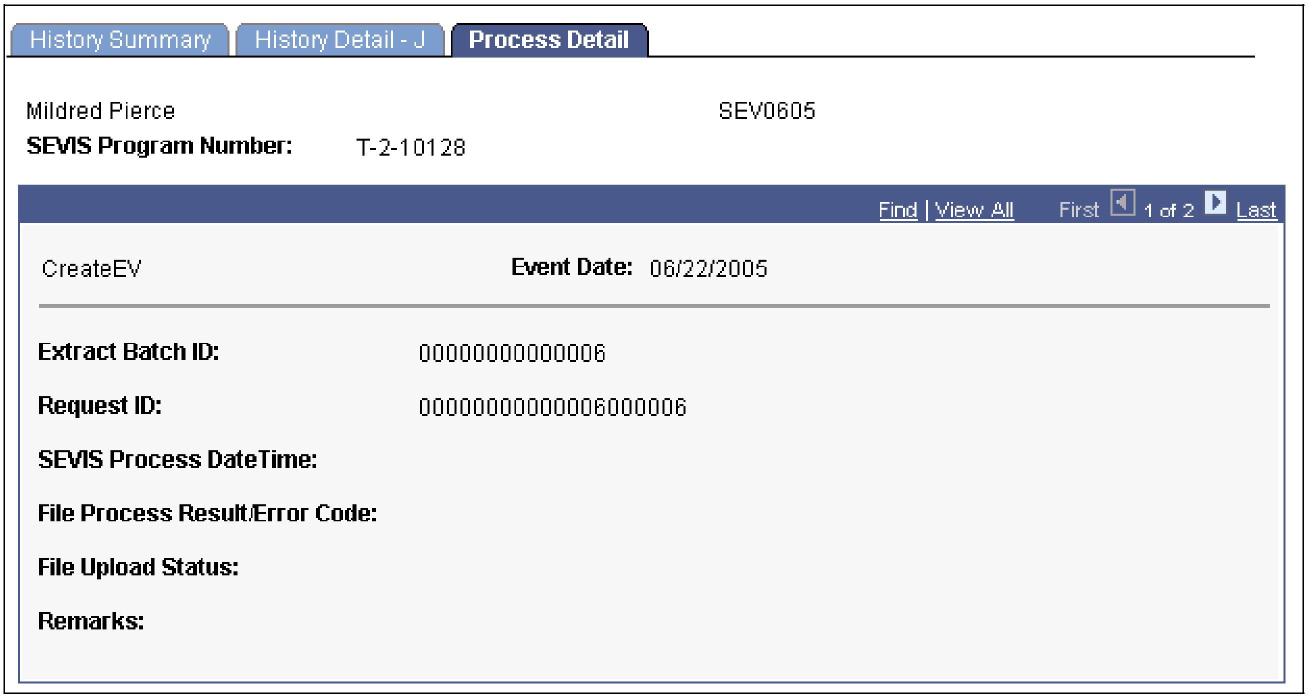
This link appears for F and M visas for the Create Student, Edit Personal, and Student Registration events.

This link appears for J visas Create EV, Personal Info and Validate events.

Click this link to access the SEVIS Alerts Addresses page where you can view address data extracted for the event. For F and M visas, the data should include the foreign and U.S. addresses. For J visas, it should include only U.S. addresses.

Viewing Event Process Details

Access the Process Detail page (Campus Community, SEVIS, View SEVIS Events History, Process Detail).



Process Detail page

If the Sent To value on the History Summary page is *SEVIS,* and the SEVIS transaction log is processed for the event through the SEVIS Import Results process, you can view the results of the import on the Process Detail page.

SEVIS School Code or **SEVIS Program Number**	The system displays either the SEVIS School Code and associated fields for F and M visas or the SEVIS Program Number and associated fields for J visas.
Extract Batch ID	Displays the ID number provided in the upload extract file. This is a unique number for each extract created by the SEVIS Export process.
Request ID	Displays the identifier used by your school to define the specific record in the upload extract file. This is a unique number for each event created by the SEVIS Export process.
SEVIS Process Date Time	Displays the date and time that the record was processed by SEVIS.
File Process Result/Error Code	If the event does not load to SEVIS successfully, this field shows the error code returned during the processing of the individual record.

File Upload Status

If the event loads to SEVIS successfully, this field value is *Successful.*

If the event does not load to SEVIS successfully, this field value is *Unsuccessful.* You must correct the error and resubmit it to SEVIS. When you run the Process SEVIS Alerts process for that visa type, the system triggers the event again and sends it to the Select Alerts to Report component for review.

Note. You must correct the data before the Process SEVIS Alerts process for that visa type runs again or you will send the event to SEVIS with the error.

Remarks

If the event does not load to SEVIS successfully, this field provides a text description of the error code returned during the processing of the individual record.

Generating an XML File to Send to SEVIS

You must run an XML extract process to create the data files in the format that SEVIS requires.

This section discusses how to generate an XML file to send to SEVIS.

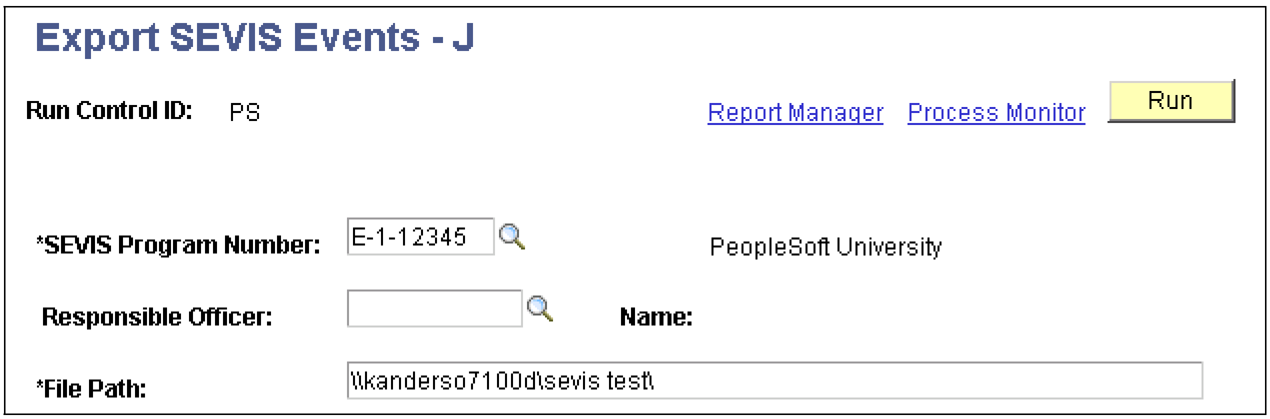
Pages Used to Generate an XML File to Send to SEVIS

Page Name	*Definition Name*	*Navigation*	*Usage*
Export SEVIS Events - F/M	RUNCTL_SEV_EXTRACT	Campus Community, SEVIS, F/M Alerts, Export SEVIS Events - F/M	Generate the XML file of F and M visas data for transmission to SEVIS.
Export SEVIS Events - J	RUNCTL_SEV_EXT_J	Campus Community, SEVIS, J Alerts, Export SEVIS Events - J	Generate the XML file of J visas data for transmission to SEVIS.

Generating the XML File

Access the Export SEVIS Events - F/M page for F/M visas processing (Campus Community, SEVIS, F/M Alerts, Export SEVIS Events - F/M), or access the Export SEVIS Events - J page for J visas processing (Campus Community, SEVIS, J Alerts, Export SEVIS Events - J).

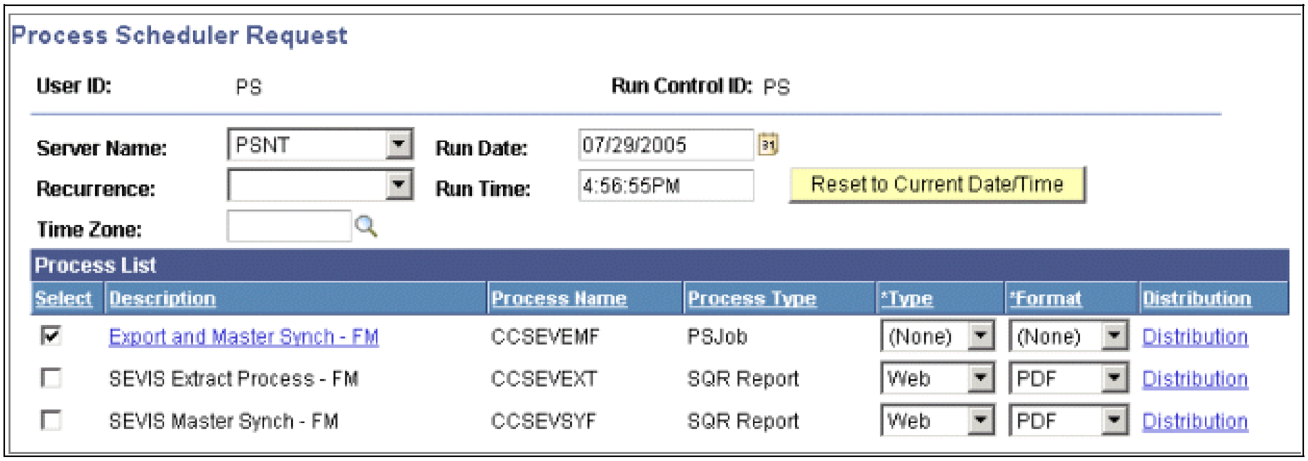
Export SEVIS Events - F/M page



Export SEVIS Events - J page

The SEVIS Export process includes two processes, the SEVIS Extract Process (CCSEVEXT for F and M visas or CCSEVEXJ for J visas) which creates the XML file to send to SEVIS, and the SEVIS Master Sync Process (CCSEVSYF for F and M visas or CCSEVSYJ for J visas) which updates the SEVIS Master directly. Which process runs depends on the visa type, the value in the Send To field on the Alerts Header page for that visa type, and the selection that you make on the Process Scheduler Request page.

To force the extract and Master Sync processes to run at the same time, select the Export and Master Synch option on the Process Scheduler Request page.



Process Scheduler Request

User ID: PS Run Control ID: PS

Server Name: PSNT Run Date: 07/29/2005

Recurrence: Run Time: 4:56:55PM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	Export and Master Synch - FM	CCSEVEMF	PSJob	(None)	(None)	Distribution
☐	SEVIS Extract Process - FM	CCSEVEXT	SQR Report	Web	PDF	Distribution
☐	SEVIS Master Synch - FM	CCSEVSYF	SQR Report	Web	PDF	Distribution

Example of the Process Scheduler Request page for the SEVIS Export process for F and M visas

When the Send To field on the Alerts Header page is set to *Master* and you select the SEVIS Master Synch option for the visa type in PeopleSoft Process Scheduler, the process updates the SEVIS Master component directly. Events set to *Master* are not included in the XML file produced by the Master Sync process.

When the Send To field on the Alerts Header page is set to *SEVIS* and you select the SEVIS Extract Process option for the visa type, the process extracts data into an XML file that is compliant with the SEVIS Create - Update Student or Create EV schema and therefore ready to send to SEVIS. Only events set to *SEVIS* are included in the XML file produced by the extract process.

The extract process creates an XML file using a 30-character file name with the SEVIS extract batch ID and the SEVIS school code for F and M visas or the program code for J visas. For example, the XML filename for F and M visas might be 00000000005DAL21400078230.xml where the 00000000005 is the SEVIS extract batch ID and DAL21400078230 is the SEVIS school code. The XML filename for J visas might be 00000000005G-2-10128.xml where the 00000000005 is the SEVIS extract batch ID and G-2-10128 is the SEVIS program number.

Note. The SEVIS system currently accepts XML files with names no longer than 30 characters, including the .xml file extension. The XML file produced by the PeopleSoft SEVIS Export process does not display the first three characters of the extract batch ID.

The SEVIS extract batch ID value is recorded on the Installation Defaults - CC page. The extract process controls and sequentially numbers the extract batch ID value with each new run.

The PeopleSoft application delivers the SEVIS extract batch ID value set to 00000000000000 and the field is set to display-only on the Installation Defaults - CC page.

Warning! Exercise extreme care if you update the SEVIS extract batch ID value. The batch ID value is an important key to SEVIS batch XML documents. PeopleSoft Campus Solutions controls the SEVIS extract batch ID value. The SEVIS system no longer requires sequential batch ID numbering, however, the Batch ID submitted with each file must be unique.

SEVIS School Code or **SEVIS Program Number**	For F and M visas, enter the SEVIS school code for the data to be exported. For J visas, enter the SEVIS program number for the data to be exported.

DSO EmplID (designated school official employee ID) or **Responsible Officer**	For F and M visas, enter the ID of the assigned DSO for the data to export. For J visas, enter the ID of the assigned responsible officer (RO) or assistant responsible officer (ARO) of the data to export. This field is optional for either visa type and is used to limit the export file to only those individuals whose current form (I-20 or DS-2019) is associated with the specified responsible ID (DSO or RO/ARO). Depending on business processes, if your institution has multiple responsible IDs, you might find it useful to limit the XML data files to a specific ID. This can assist with the organization and review of transaction log results and forms received from SEVIS.
File Path	Enter the path to the destination where you want the system to store the created export file.

Downloading and Viewing SEVIS Results

Before you can view results from SEVIS, you must complete the upload of the XML file to SEVIS, the download of the XML transaction log, and the download of PDF form files from SEVIS (I-20 PDF for F and M visas or DS-2019 PDF for J visas) using the utility program of your choice that supports SSL and HTTPS. Many utility programs (freeware, shareware, and licensed) support SSL and HTTPS data transmissions.

Consult the U.S. Immigrations and Customs Enforcement web site for digital certificate and batch file transmission instructions.

See *Reference Manual for the Student and Exchange Visitor Information System Batch Interface, Application Program Interface (API)* http://www.ice.gov/sevis/schools/batch.htm.

After you send the XML file to SEVIS, you receive the upload results from SEVIS to verify that the information was received. You also receive the processed results of the data file and PDF format files for printing the forms.

Warning! The upload command must include an output statement for receiving the transaction log containing the upload results. If the upload is unsuccessful, the file needs to be loaded using SEVIS Import Results process for the visa type so that the SEVIS Master rows are deleted and the error can be corrected. The events appear on the Alerts Header page in the Select Alerts to Report component again after the Alerts process for the visa type runs.

The following is a sample of a cURL command asking for the upload results for F and M visas: cURL -E seviscert2.pem:sevistest -F orgid=SEA214F00078000 -F batchid=12340000091540 -F userid=tpdso-4140 -F xml=@40000091540SEA214F00078000.xml https://egov.ice.gov/sbtsevisbatch/action/batchUpload -k -v -L -o batch91540.xml

The following is a sample of a cURL command asking for the upload results for J visas: cURL -E seviscert2.pem:sevistest -F orgid=G-2-10128 -F batchid=12340000091530 -F userid=kander6952 -F xml=@12340000091530G-2-10128.xml https://egov.ice.gov/sbtsevisbatch/action/batchUpload -k -v -o batch91530j.xml

This section discusses how to:

- Download SEVIS import results.

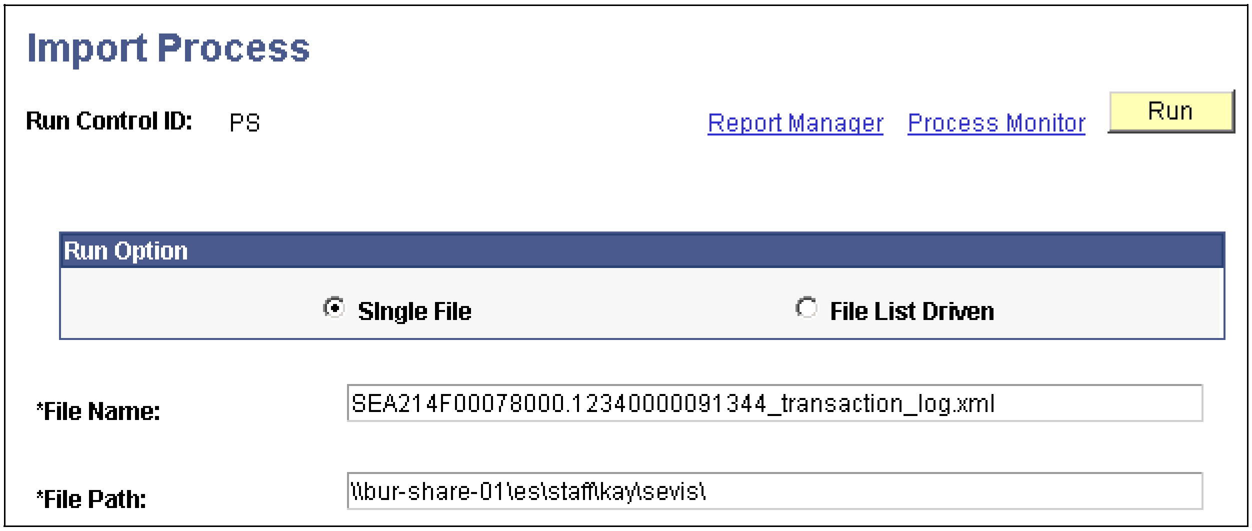
- View results of the XML upload to SEVIS.
- View results of the SEVIS download.
- View individual student or exchange visitor record results.
- View individual dependent record results.

Pages Used to Download and View SEVIS Results

Page Name	*Definition Name*	*Navigation*	*Usage*
Import Process	RUNCTL_SEV_DOWNLD	Campus Community, SEVIS, SEVIS Import, Import Process	Enter SEVIS Download process parameters to import the acknowledgement file and results file from SEVIS.
File Upload Result	SEV_UPLOAD_RSLT	Campus Community, SEVIS, SEVIS Import, Import Results, File Upload Results	Review the acknowledgement file.
Download Results	SEV_DOWNLD_RSLT	Campus Community, SEVIS, SEVIS Import, Import Results, Download Results	Review the transaction log results file.
Student/EV (student/exchange visitor)	SEV_DOWNLD_RSLT2	Campus Community, SEVIS, SEVIS Import, Import Results, Student/EV	Review the individual transaction record results for a student (F and M visa) or exchange visitor (J visa).
Dependents	SEV_DOWNLD_RSLT3	Campus Community, SEVIS, SEVIS Import, Import Results, Dependents	Review the individual transaction record results for a dependent.

Downloading SEVIS Import Results

Access the Import Process page (Campus Community, SEVIS, SEVIS Import, Import Process).



Import Process page

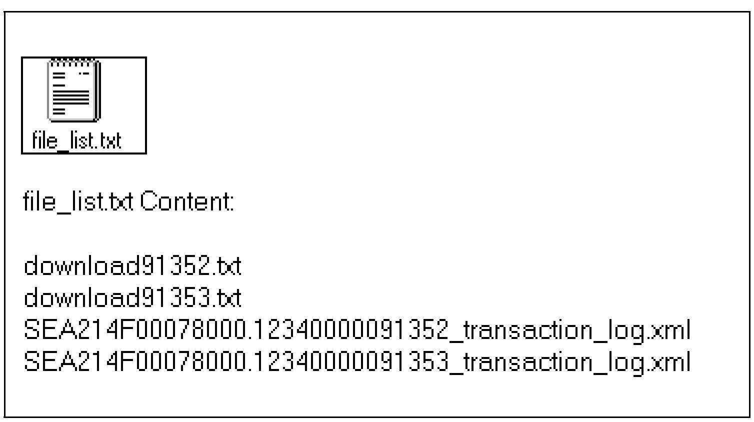
The SEVIS Import Results process loads file acknowledgement and transaction log results obtained from SEVIS into the PeopleSoft Campus Solutions system.

Single File Select to load a single transaction log file.

File List Driven Select to load multiple fields.

To load multiple files, you must create a document (for example, .txt) that lists all of the file acknowledgement and transaction log files that you want to load.

This graphic provides a visual example of the file list produces for the File List Driven option.



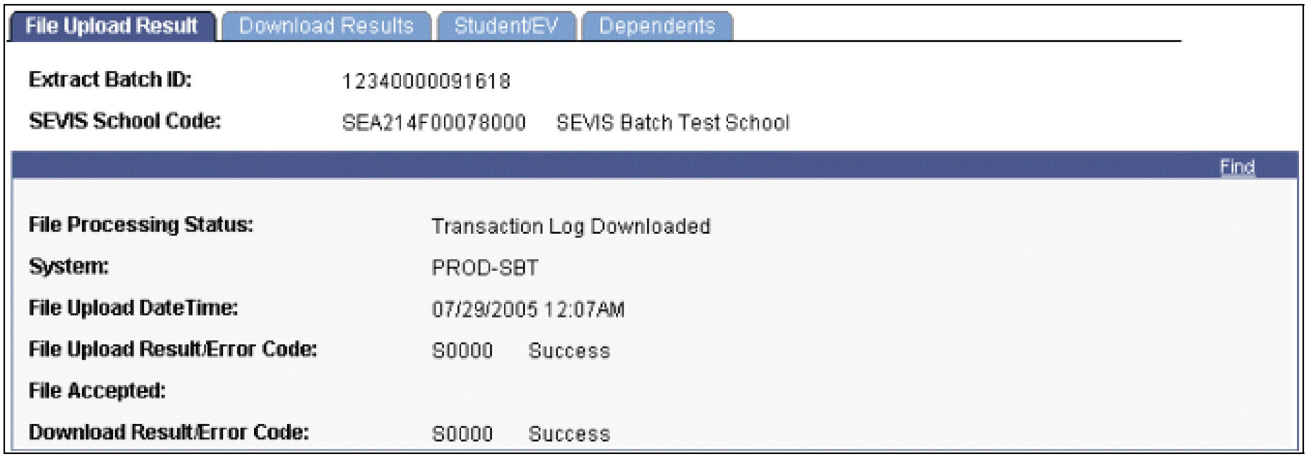
Example of a file list for the File List Driven option

File Name Enter the file name using the file naming convention approved by SEVIS.

File Path Enter the path to the file location.

Viewing Results of the XML Upload to SEVIS

Access the File Upload Result page (Campus Community, SEVIS, SEVIS Import, Import Results, File Upload Results).


File Upload Result | Download Results | Student/EV | Dependents

Extract Batch ID: 12340000091618

SEVIS School Code: SEA214F00078000 SEVIS Batch Test School

Find

File Processing Status: Transaction Log Downloaded

System: PROD-SBT

File Upload DateTime: 07/29/2005 12:07AM

File Upload Result/Error Code: S0000 Success

File Accepted:

Download Result/Error Code: S0000 Success

File Upload Result page

This page reflects the SEVIS upload results status of the overall batch file from the XML document upload. The information is based on results provided in the file acknowledgement returned by SEVIS.

Note. You must run the SEVIS Import Results process for the visa type to load information from the upload results file produced as a result of uploading the XML file to SEVIS.

```
  <?xml version="1.0" encoding="UTF-8" ?>
- <TransactionLog>
  - <BatchHeader>
      <BatchID>12340000091538</BatchID>
      <OrgID>SEA214F00078000</OrgID>
    </BatchHeader>
  - <BatchDetail status="true" system="ALPHA">
      <Upload resultCode="S0000" dateTimeStamp="2005-05-17T16:03:40.421-04:00" />
    </BatchDetail>
  </TransactionLog>
```

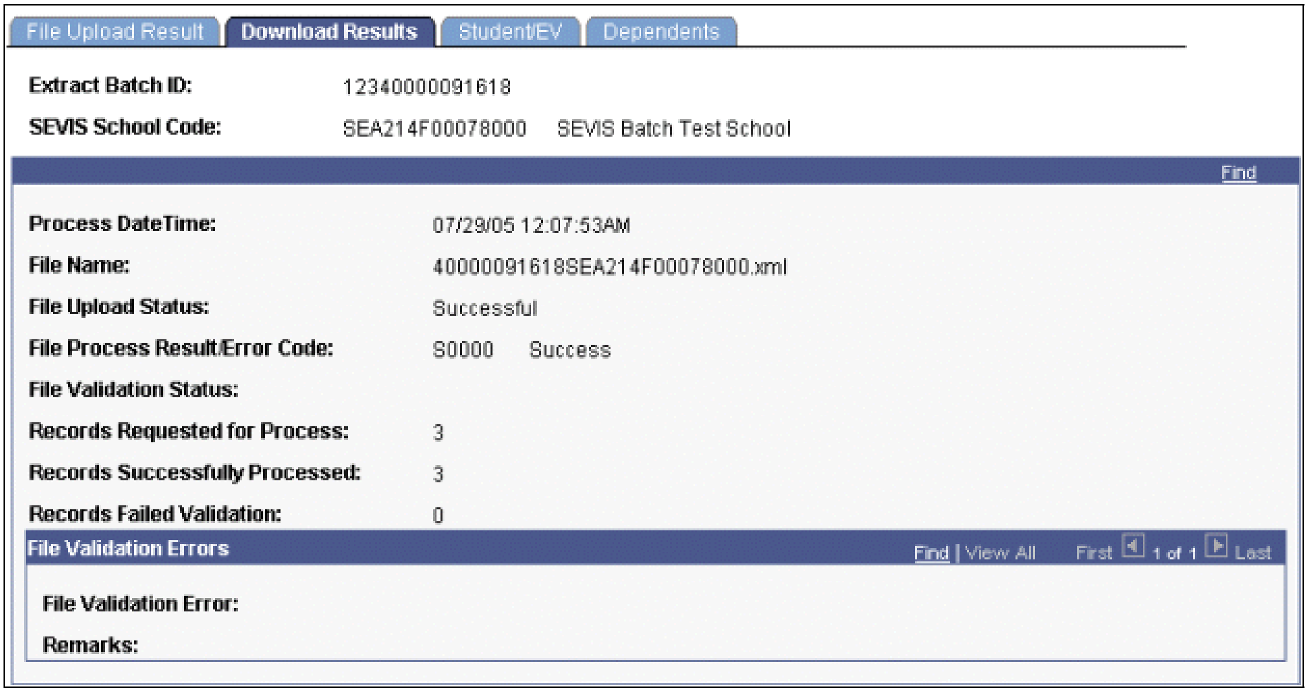
Example of upload results

SEVIS School Code or **SEVIS Program Number** — The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas.

File Processing Status	Displays the status of the file from SEVIS. The possible status values are *Exported, Upload Acknowledged, Transaction Log Downloaded,* or *Processing Complete.* Each time the SEVIS export process for a visa type runs, a new row with the extract batch ID and either SEVIS school code for F and M visas or the SEVIS program number for J visas appears with the exported file processing status. After you load the file acknowledgement log from SEVIS, the status changes to *Upload Acknowledged.* After you load the transaction log from SEVIS, the status changes to *Processing Complete.*
System	Displays the SEVIS batch system from which the transaction log was requested. Values include *PROD,ALPHA,* or *BATCH.*
File Upload Date Time	Displays the date and time that the upload request was processed by SEVIS.
File Upload Result/Error Code	If the file processing is unsuccessful, the file upload error from SEVIS appears. This can be any number of explanations of the error from the File Errors Setup Table. One example is *File does not comply with SEVIS XML Schema.* You should correct all errors before running the SEVIS Alerts process for that visa type again.
File Accepted	Indicates whether SEVIS accepted the file for processing. This value is not sent with the transaction log, but remains on the page for historical reference.
Download Result/Error Code	If the file download was unsuccessful, the download error from SEVIS appears. The code and description are based on the SEVIS File Errors table. You should correct all errors before running the SEVIS Alerts process for the visa type again.

Viewing Results of the SEVIS Download

Access the Download Results page (Campus Community, SEVIS, SEVIS Import, Import Results, Download Results).



Download Results page

This page shows the status of the batch XML document processed by the SEVIS system. The information is based on results provided in the transaction log returned by SEVIS after the file is accepted and processed.

SEVIS School Code or **SEVIS Program Number**

The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas.

File Upload Status

Displays the *Successful* or *Unsuccessful* file status returned from the SEVIS system.

File Process Result/Upload Error Code

If the file upload is unsuccessful, the file upload error from SEVIS appears here.

File Validation Status

Displays the *Pass* or *No Pass* status of the file schema validation performed by the SEVIS system before transaction records are processed.

The value is not included in the transaction log, but remains on the page for historical reference.

Records Requested for Process

Displays the number of unique records included in the XML document to be processed.

Records Successfully Processed

Displays the number of records successfully processed by the SEVIS system.

Records Failed Validation

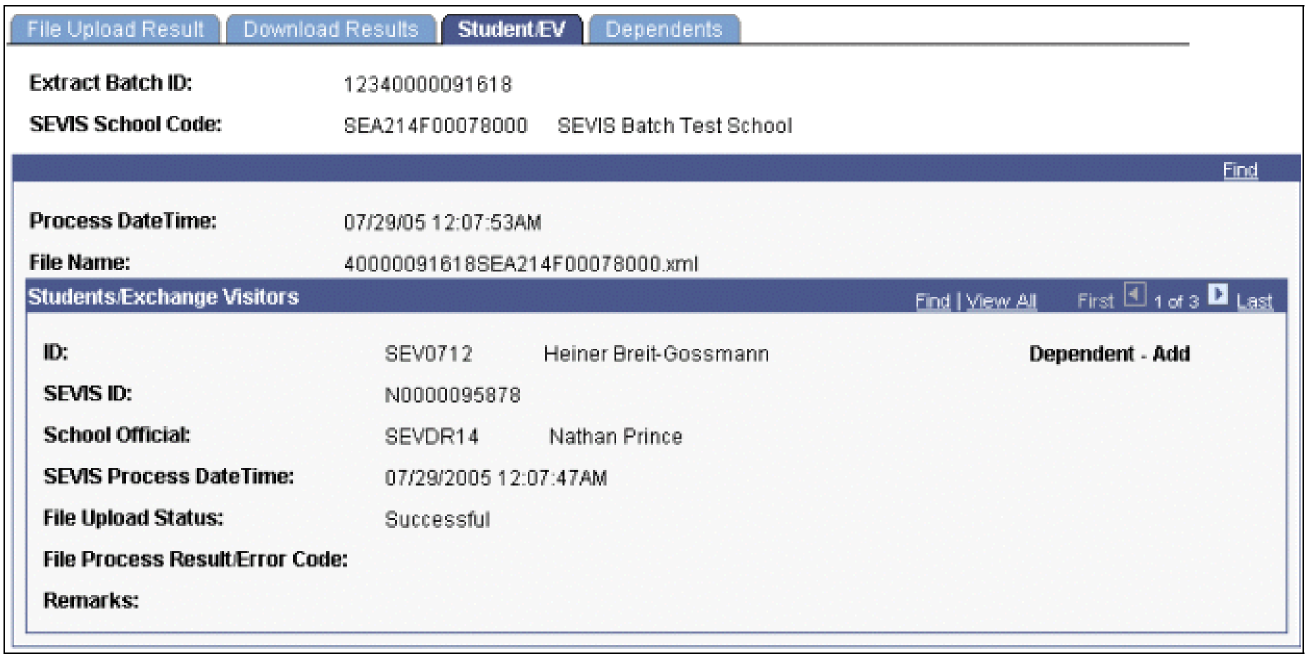
Displays the number of records unsuccessfully processed by the SEVIS system.

File Validation Errors

File Validation Error	If the file validation fails, the file validation error code from SEVIS appears here. You should correct all errors before running the SEVIS Alerts process for the visa type again.
Remarks	Displays the SEVIS file validation error description.

Viewing Individual Student or Exchange Visitor Record Results

Access the Student/EV page (Campus Community, SEVIS, SEVIS Import, Import Results, Student/EV).



Student/EV (exchange visitor) page

This page shows the results of an individual student or exchange visitor transaction record. The information is based on results provided in the transaction log returned by SEVIS.

SEVIS School Code or **SEVIS Program Number**	The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas.

Students/Exchange Visitors

ID	Displays the ID assigned to the individual in the PeopleSoft system.

SEVIS ID

Displays the ID assigned to the individual by the SEVIS system.

For new students or exchange visitors submitted to SEVIS using the Create Student or Create EV event, the SEVIS ID is returned only if the record is successfully processed by the SEVIS system.

School Official or **Responsible Officer**

Displays the PeopleSoft ID and name of the school official the for F and M visas or the responsible officer for J visas that is assigned to the event.

SEVIS Process Date Time

Displays the date and time that the XML file was processed by SEVIS.

File Process Result/Upload Error Code

If the file upload is unsuccessful, the file upload error from SEVIS appears here.

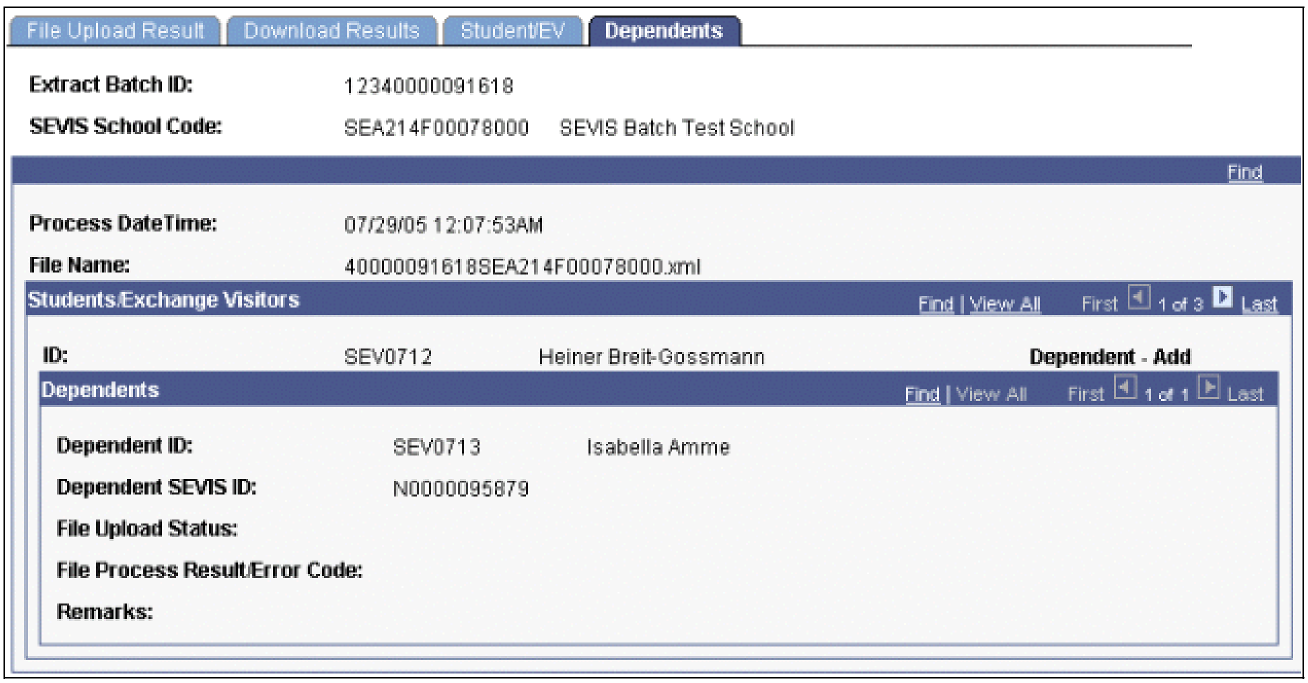
You should correct all errors before running the Process SEVIS Alerts process for that visa type again.

Remarks

Displays the SEVIS file process error description.

Viewing Individual Dependent Record Results

Access the Dependents page (Campus Community, SEVIS, SEVIS Import, Import Results, Dependents).



Dependents page

This page shows the results of an individual dependent transaction record. The information is based on results provided in the transaction log returned by SEVIS.

SEVIS School Code or **SEVIS Program Number** The page appears with the SEVIS School Code field displayed for F and M visas, or the SEVIS Program Number field displayed for J visas.

Students/Exchange Visitors

ID The system displays the PeopleSoft ID for the student or exchange visitor.

Dependents

Dependent ID Displays the ID assigned to the dependent in the PeopleSoft system.

Dependent SEVIS ID Displays the ID assigned to the dependent by the SEVIS system.

For new dependents submitted to SEVIS using the Create Student event, Create EV event, or Dependent - Add event, the SEVIS ID is returned only if the record is successfully processed by the SEVIS system.

File Upload Status Indicates whether the record was processed successfully.

This value is not used in the transaction log, but remains on the page for historical reference.

File Process Result/Error Code If the file upload is unsuccessful, the file upload error from SEVIS appears here.

You should correct all errors before running the Process SEVIS Alerts - F/M or Process SEVIS Alerts - J process for that visa type again.

Remarks Displays the SEVIS file process error description.

This value is not used in the transaction log, but remains on the page for historical reference.

Extracting External Vendor Data

This section provides an overview of external vendor system integration and discusses how to extract external vendor data.

Page Used to Extract External Vendor Data

Page Name	*Definition Name*	*Navigation*	*Usage*
External Extract	RUNCTL_CCSEVINT	Campus Community, SEVIS, SEVIS External System Export, External Extract	Select data parameters for integration with an external vendor.

Understanding the Integration to External Vendor Systems

For institutions that use a system other than PeopleSoft Campus Solutions for batch interface transmissions to SEVIS, the PeopleSoft application provides a process to extract selected international student biographical, admissions, and records data for loading into a third-party vendor software program. The data is extracted based on the parameters that you enter on the External Extract page. The third-party software uses this data for SEVIS processing.

The External System Export process creates an XML document in a schema defined by PeopleSoft. This XML schema is defined to include fields maintained in the PeopleSoft system that are reportable to SEVIS, as well as additional data fields used by programs (external to Campus Solutions) that provide batch interface functionality to the SEVIS system.

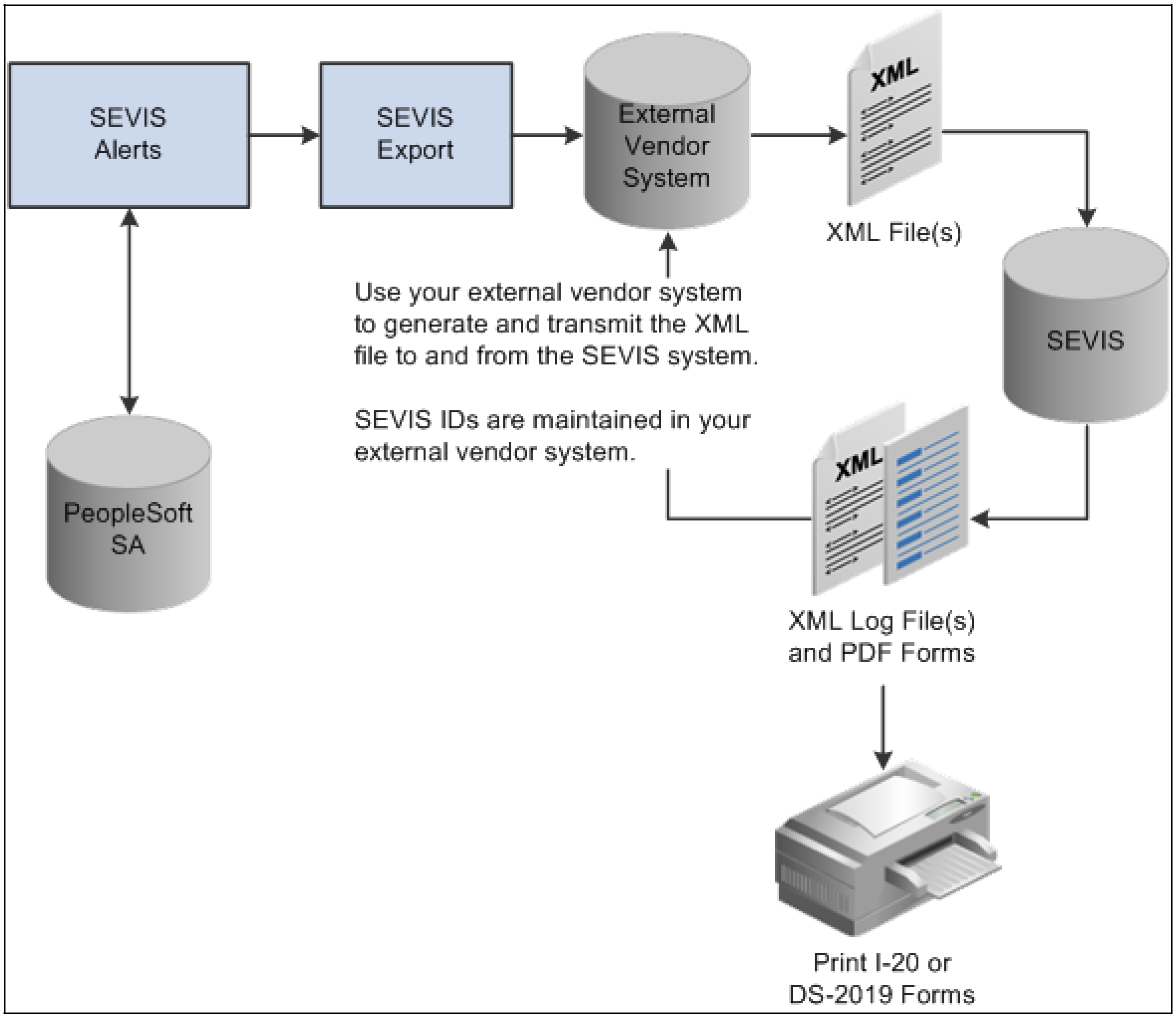
Refer to the PeopleSoft_SEVIS_ExternalSystemExtract.xsd and to the PeopleSoft_SEVIS_ExternalSystemExtract_Definition.xls for specific schema definition and for a list of fields that are included in the XML document that is created by the process.

PeopleSoft Campus Solutions to External Vendor System

The External System Export process exports all current data (for fields defined by the schema) for all students who meet the visa type selection criteria that you specify. The External System Export process creates an XML document that includes all current, relevant data for the population of students that you define.

In the following business process flow, it is assumed that you have completed the SEVIS setup for your PeopleSoft system and that you use an external vendor system for identifying and submitting data to submit to the SEVIS system.

This flowchart illustrates the external vendor system export processing business process. It shows the flow of SEVIS alerts from the PeopleSoft database to the external vendor system, which creates and sends the XML file to SEVIS. It then shows the flow of the SEVIS IDs from SEVIS to the PeopleSoft XML log and printed I-20 or DS-2019 form.



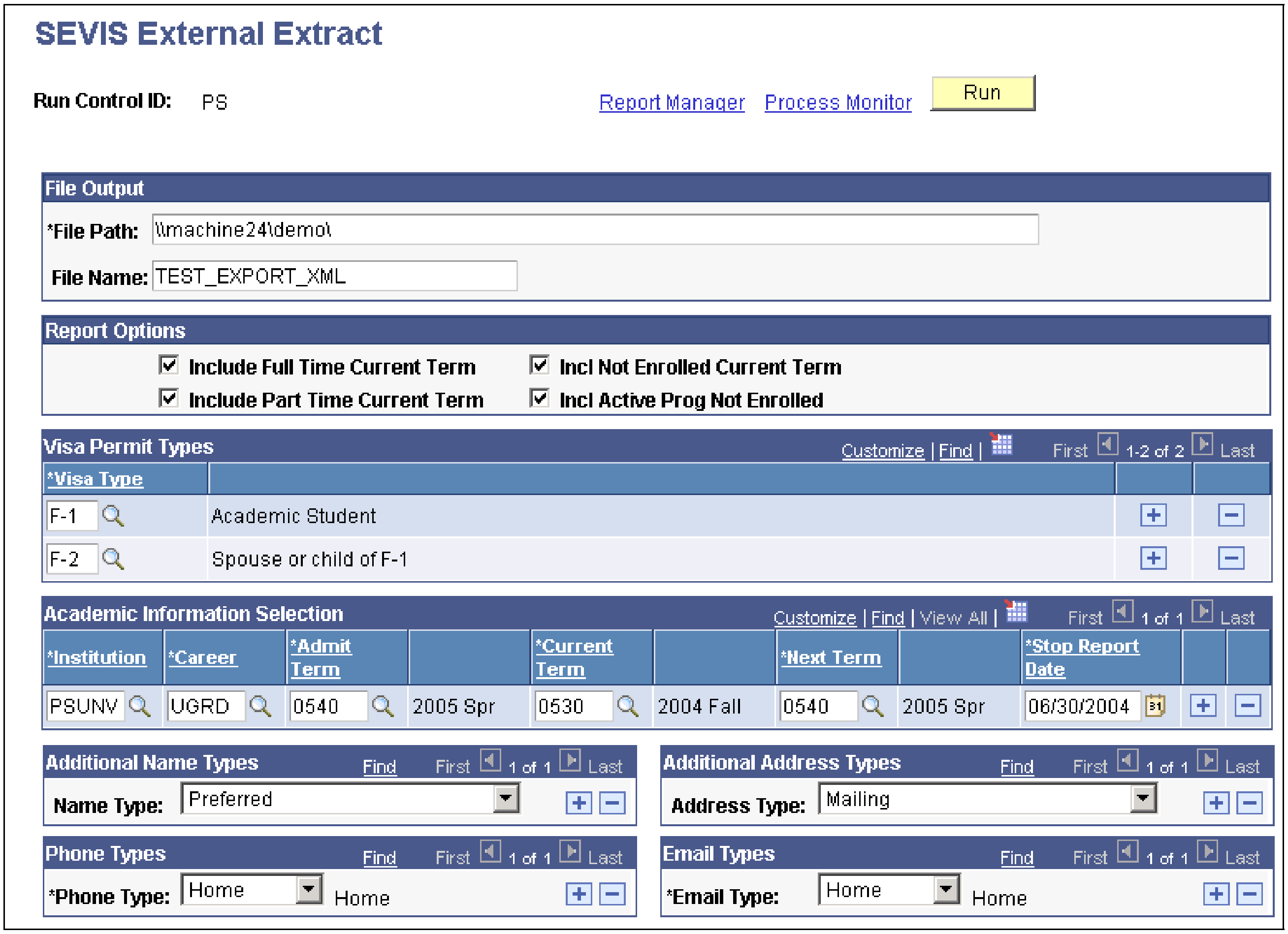
External Vendor System Export process business flow

You must enter data on the SEVIS Setup page, the SEVIS School Code Table page, the SEVIS Program Sponsor Table, the DoS Post Code Table page, the Port of Entry Table page, the Country Mapping page, the Visa Mapping page, and the Suffix Mapping page to make use of the External System Export process. The mappings defined on these pages are important for identifying correct data that are included in the resulting XML document.

You must maintain current visa type information (using country equal to *USA*) in the PeopleSoft system for the population of individuals that you want to include in an external system extract.

Extracting Data for External Vendor Systems

Access the SEVIS External Extract page (Campus Community, SEVIS, SEVIS External System Export, External Extract).



SEVIS External Extract page

You can extract F/M visas data or J visas data for external vendor systems.

File Output

File Path	Enter the path to where you want to place the output file.
File Name	Enter a name for the output file. If you do not specify a file name, the system generates the extracted XML document uses the following naming convention: [ProgramName][RunControlID][ProcessInstance]. For example, CCSEVINT_ExternalSysExport_126.xml.

Report Options

Select each of the reports that you want to generate. Reports are generated in .pdf format. The options are:

Include Full Time Current Term to generate a list of students who are enrolled full time for the current term.

Include Part Time Current Term to generate a list of students who are enrolled part time for the current term.

Incl Not Enrolled Current Term to generate a list of students who are not enrolled for the current term.

Incl Active Prog Not Enrolled to generate a list of students who have an active program but are not enrolled for the current term.

Visa Permit Types

Visa Type

Enter each visa type to use as selection criteria for the program.

The External System Export process selects students and exchange visitors who have the specified visa types defined on the Visa/Permit Data page.

Academic Information Selection

Institution

Select the institution to use for the extract.

Career

Select the career to use for the extract.

Admit Term

Select the admit term to use for the extract.

The program uses this value to determine which admission data rows to include in the output.

Current Term

Select the current term.

The program uses the current term that you specify to identify the current term end date from the term calendar. The current term end date is a field that is reportable to SEVIS.

Next Term

Select the next academic term following the current.

The program uses the next term you specify to identify the next session start date from the term calendar. The next session start date is a field that is reportable to SEVIS.

Stop Report Date

Enter the date (usually a prior date) to indicate when an individual is no longer included in the active population.

The program uses the stop report date to limit the individuals included in the active population. The program evaluates the stop report date that you specify, comparing it against the student's most recent enrollment activity for that institution and career. If the student was last enrolled for a term that ended before the stop report date, the student is not included in the extract.

For example, many F-1 students maintain an institution affiliation after graduating by pursuing Optional Practical Training. Consider these students when determining a stop report date.

Additional Name Types

Name Type	Select each additional name types to extract for all individuals included in the extract process. The program exports all current name data for the types that you specify that are recorded for the individual. The name data required for SEVIS is included in a separate structure in the XML document created by the process. Select additional names if your external system can make use of them.

Additional Address Types

Address Type	Select each additional address type to extract for all individuals included in the extract process. The program exports all current address data for the types that you specify that are recorded for the individual. The address data required for SEVIS is included in a separate structure in the XML document created by the process. Select additional addresses if the external system can use them.

Phone Types

Phone Type	Select each phone type to extract for all individuals included in the extract process. The program exports all current phone data for the types that you specify that are recorded for the individual.

Email Types

Email Type	Select each email type to extract for all individuals included in the extract process. The program exports all current email data for the types that you specify that are recorded for the individual.

Chapter 45

Understanding the 3Cs — Communications, Checklists, and Comments

This chapter provides an overview of the 3Cs — communications, checklists, and comments and lists common elements.

The 3Cs — communications, checklists, and comments — are a flexible way to track and analyze correspondence, lists of requirements, and notes about the students, staff, constituents, and organizations in your database.

Communication management enables you to fully manage all types of contacts inside and outside your institution. Checklist management enables you to create lists of requirements and monitor their status. Comments creation enables you to attach notable remarks about individuals and organizations.

You can enter communications, checklists, and comments manually throughout your system, or, using the 3C engine, you can define events and triggers to have the system add communications, add comments, and add or update checklists for individuals or organizations automatically from within your business processes. You can also use the Population Selection process to select a specific population for the 3C engine to assign items to.

Each of the 3Cs requires an administrative function and a 3C update/inquiry group.

The administrative function identifies the variable data associated with the specific category of communication, checklist, or comment. For example, the administrative function of ADMA, for Admissions [Application Level] identifies the Academic Career, Student Career Number, Application Number, and Application Program Number.

The 3C update/inquiry group provides user-level security access to categories of communications, checklists, and comments, while providing or restricting the user's ability to edit the data. For example, a security administrator might give a specific user 3C update/inquiry group security access to items in the Notice of Dismissal communication category, with an update only status so that he or she can view the data but cannot modify it.

Buttons appear on many pages in the system to enable you to transfer directly from that page to another page within the same administrative function, to generate or review a communication, checklist, or comment for the individual or organization whose information you are currently viewing.

Common Elements Used in The 3Cs Chapters

 (communications)	Transfers you to the appropriate Communications Management page, where you can review or create communications for the individual or organization. Communications include letters, phone calls, meetings, emails, and faxes.
 (checklists)	Transfers you to the appropriate Checklists Management page, where you can review or create checklists for the individual or organization. Checklists may be lists of steps that must be performed, or documents that must be provided, or communications that are planned to occur, and so on.
 (comments)	Transfers you to the appropriate Comments page, where you can review or enter comments about the individual or organization.

Chapter 46

Using the Population Selection Process

This chapter provides an overview of the Population Selection group box and discusses how to:

- Use the Population Selection process.
- Run the Population Update process.

Understanding the Population Selection Group Box

A standard group box appears on run control pages for processes that use the Population Selection process to select the IDs to process. The Population Selection process may be required for some processes (for example, the Mass Assign Service Indicators process) but optional for others (for example, the 3C Engine process). The Population Selection Context Definition for a process controls whether the Population Selection process is available and if is required or optional.

If your institution defines a context definition that makes the Population Selection process available, the run control page for that process includes a standardized Population Selection group box. If the Population Selection process is available but optional, the run control page includes a check box that users can either select or clear to enable or disable the use of the Population Selection process. Depending on the page design, the check box, if it appears, might or might not be within the standard group box.

For the Mass Assign Service Indicators process, which is used in this section as an example of a process configured to use population selection, the group box appears at the top of the run control page. Because population selection is mandatory, the check box does not appear.

This section discusses the fields, links, and buttons that behave the same in the standard population selection group box wherever it appears on run control pages throughout PeopleSoft Campus Solutions. The values and parameters that you enter are specific to the application process. Consult the appropriate PeopleSoft PeopleBook for information about using population selection for a specific application process.

This table lists the application processes that, as of the date of this publication, are configured to use the Population Selection utility.

Application Process	***Reference***
Audience Criteria	
Advisement Report	
Application Delete by Batch	
Prospect Delete by Batch	

Application Process	***Reference***
3C Engine	
Mass User Security Replacement	
Population Update	
Process Student Groups	
Service Indicator Person Mass Assign and Service Indicator Organization Mass Assign	
Service Indicator Person Mass Release and Service Indicator Organization Mass Release	
Aid Year Activate	
Mass Packaging Select	
Select Students for Need Summary Validation	
Select Students for Repackaging	
Process Satisfactory Academic Progress (SAP)	
SF External Award Feed	
Mass Contract Select	
Process Transcripts and Batch Transcript Request	
Process User Edit Messages	
Ability to Benefit	
NSLDS Request	
NSLDS Data Push	

Using the Population Selection Process

This section lists the pages used for implementing the population selection process and provides an example.

Pages Used for the Population Selection Process

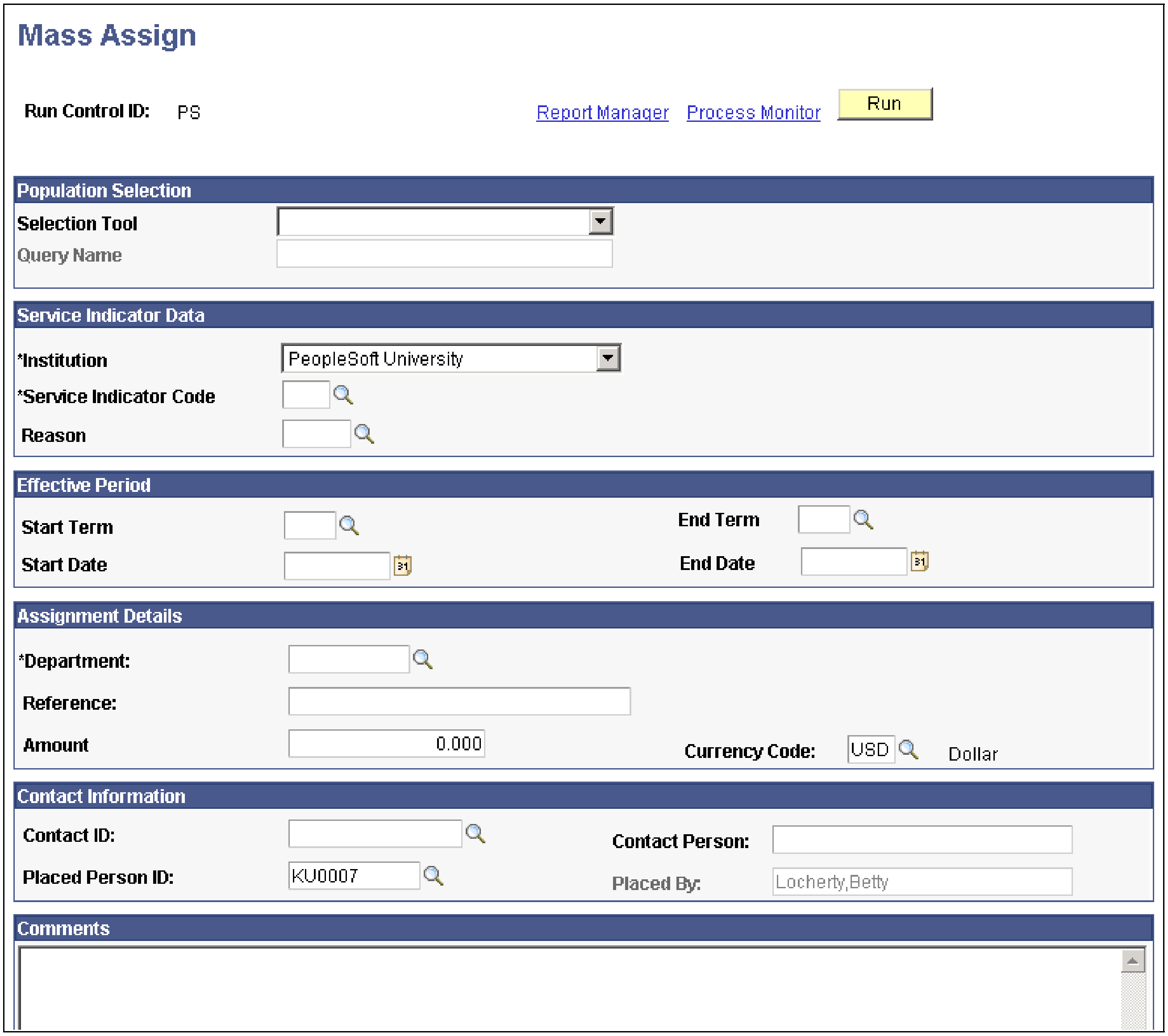
Note. You access the pages listed here from the standard Population Selection group box, wherever it exists in the database. You will use other pages depending on the values and parameters that you enter for a specific process. Those pages are documented where the specific run control page for that business process is documented.

Page Name	***Definition Name***	***Navigation***	***Usage***
Equation Editor	EQUATION_EDITOR	Click the Create Equation or Edit Equationlink in the Population Selection group box on a run control page when the selection tool is *Equation Engine.* The Create Equation and Edit Equation links only appear if the user has appropriate security for creating or editing equations and the selection tool is Equation Engine.	Create a new equation or edit the selected equation to use for a process.
Equation Parameters	SCC_EQTN_POP_PARM	Click the Edit Prompts link in the Population Selection group box on a run control page when the selection tool is *Equation Engine.* The Edit Prompts link appears only if the equation is set to use prompts.	View or enter prompts for an equation.
Query Manager	QRY_SELECT	Click the Launch Query Manager link in the Population Selection group box on a run control page when the tool is PS Query. Reporting Tools, Query Manager	If you have security access to Query Manager, create a new query or edit the selected query to use for a process.
Preview Selection Results	SCCPS_RESULTS	Click the Preview Selection Results link in the Population Selection group box on a run control page. The Preview Selection Results link appears only if preview functionality is enabled on the Selection Tool page for the tool selected.	Preview the results that will be returned by the tool.

Page Name	***Definition Name***	***Navigation***	***Usage***
Population Selection File Mapping	SCCFP_PS_FILE	Set Up SACR, System Administration, Utilities, File Parser, Population Selection File Map Click the Create File Mapping link or Edit File Mapping link in the Population Selection group box on a run control page when the tool is external file.	Create or edit a mapping for an external file for use by the Population Selection process.

Example: Using Population Selection

Access the run control page for the specific process, for example, the Mass Assign service indicators process (Campus Community, Service Indicators, Person, Mass Assign).



Example of the standard Population Selection group box on a Campus Solutions page

Population Selection

Selection Tool

Select the tool to use to identify the population for the process.

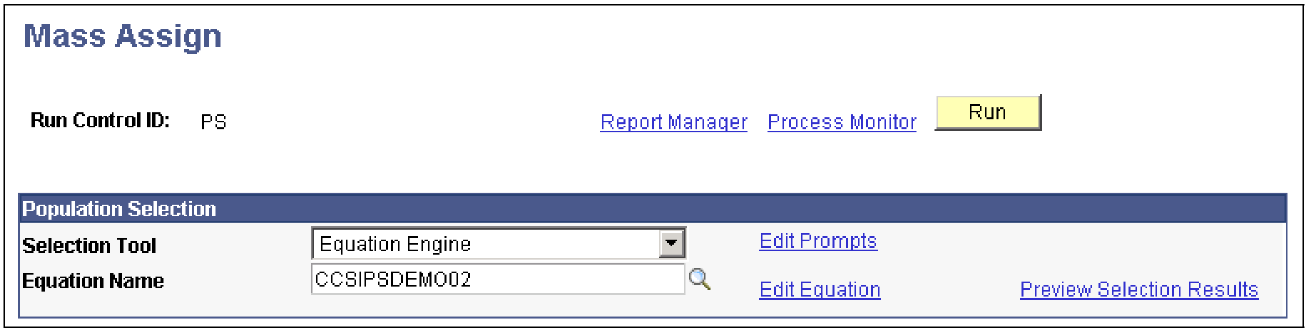
Only tools set to *Active* on the Selection Tool setup page and the applicable selection tools defined in the context definition for the process are available in this drop-down list box.

The PeopleSoft system delivers the following tools with a default status of *Active: Equation Engine*, *External File,* and *PS Query.* If your institution creates other tools, sets them to active status, and lists them in the context definition for a specific process, then they also will be available in this drop-down list box.

Fields and links appear on the subpage based on the tool that you select.

Equation Engine Tool

This section describes the fields and links that appear when you select the *Equation Engine* tool in the Population Selection group box on a page.



Example of the Population Selection group box with the Equation Engine tool selected

When you select the *Equation Engine* tool, if you have the appropriate security for creating equations a Create Equation link appears next to the Equation Name field. If you must create an equation, you can click this link to launch Equation Editor in a separate window, where you can create the equation, save it, and then enter the equation name in the Equation Name field without exiting the page that contains the Population Selection group box.

If you have the appropriate security to create and edit equations, when you enter an equation name the Create Equation link will change to the Edit Equation link. You can click the Edit Equation link to open the Equation Editor page for that equation and edit it.

Note. If you save the page with an equation name entered in the Population Selection group box and you subsequently edit and save that equation in Equation Editor, then you do not have to save the page that contains the group box again to benefit from changes to the equation.

Selection Tool

Displays the type of tool that you selected. In this example, *Equation Engine* was selected.

Equation Name

Select the equation to use.

Only equations valid for the specific process are available. Limiting the prompt list to valid equations ensures that users select IDs with the appropriate data needed for running the process. Valid equations include the application prompt name that is set on the Equation To Context Mapping page.

The PeopleSoft system delivers predefined equations for specific processes. A list of equations delivered as of the date of this publication is provided as an appendix to this PeopleBook.

Create Equation

This link appears only if you have security access to create new equations and if no equation name is entered.

Click this link to launch Equation Editor in a new window, where you can create a new equation.

Warning! Never modify and save a delivered equation using the original equation name. The PeopleSoft system delivers predefined equations upon which specific processes depend. If you want to create a different version of a delivered equation, save it using a different name and then modify it.

Edit Prompts

This link appears after you enter the equation name and only if the equation that you selected is set to use prompts.

Click this link to access the Equation Parameters page, where you can view or enter prompts for the equation.

Edit Equation

This link appears only if you have appropriate security for editing existing equations.

Click this link to launch Equation Editor in a new window, where you can view and edit the specified equation.

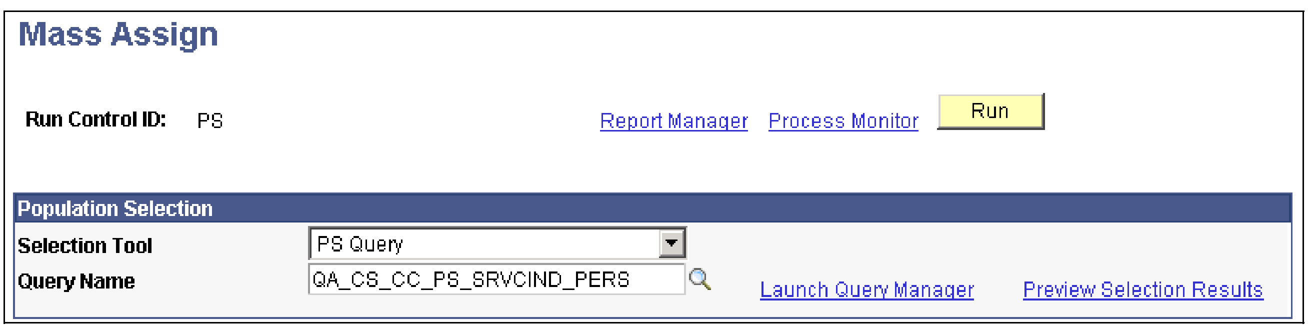
Preview Selection Results

This link appears only if the Enable Preview Results check box is selected on the Selection Tool page for the Equation Engine.

Click this link to preview results based on the parameters that you selected before you run the process.

PS Query Tool

This section describes the fields and links that appear when you select the *PS Query* tool in the Population Selection group box on a page.



Example of the Population Selection group box with the PS Query tool selected

Selection Tool

Displays the type of tool you selected. In this example, the *PS Query* tool was selected.

Query Name

Select the query to use.

Only queries valid for the specific process are available. Limiting the prompt list to valid queries ensures that users select IDs with the appropriate data needed for running the process. Valid queries use a data source record listed in the context definition.

The PeopleSoft system delivers predefined equations for specific processes. A list of equations delivered as of the date of this publication is provided as an appendix in this PeopleBook.

Edit Prompts

This link appears after you enter the query name and only if the query that you selected is set to use prompts.

Click this link to access the Query Prompts page, where you can view or enter prompts for the specified query.

Launch Query Manager

This link appears only if you have the appropriate security for accessing the Query Manager component.

Click this link to launch Query Manager in a separate window, where you can create or update a query without exiting the Population Selection subpage.

Warning! Never modify and save a delivered query using the original query name. The PeopleSoft system delivers predefined queries upon which specific processes depend. If you want to create a different version of a delivered query, save it using a different name and then modify it.

See *PeopleTools: PeopleSoft Query*.

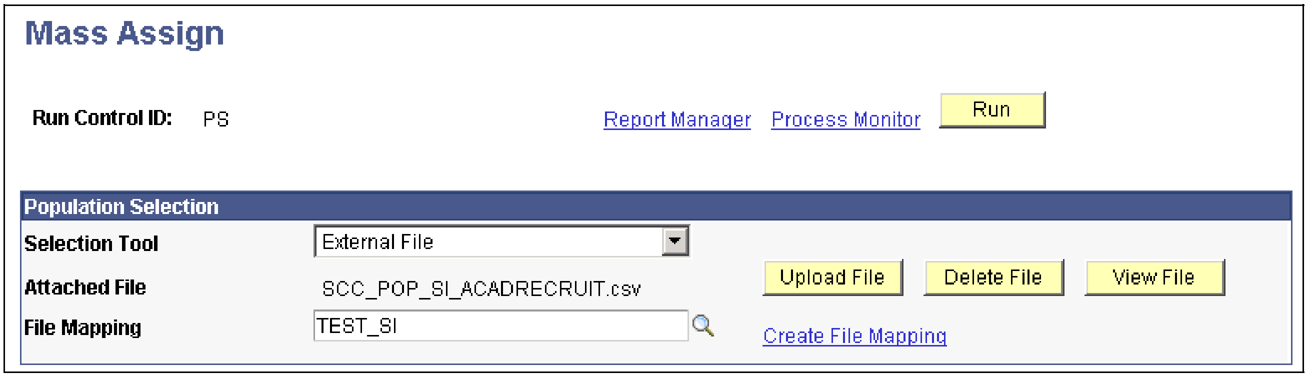
Preview Selection Results

This link appears only if the Enable Preview Results check box is selected on the Selection Tool page for the PS Query tool.

Click this link to preview results based on the parameters that you selected before you run the process.

External File Tool

This section describes the fields and links that appear when you select the *External File* tool in the Population Selection group box on a page.



Example of the Population Selection group box with the External File tool selected

Depending on how your institution sets up the external file tool for population selection, you will be required to upload a file as an attachment or you will be required to provide a path to a file. If you upload a file as an attachment, your system will be set up to locate the attachment where the application server and Process Scheduler can access it. If you provide a path, you must be sure to provide a path that the server and Process Scheduler can access.

The example used in this section requires an uploaded file to attach.

Selection Tool

Displays the type of tool selected. In this example, *External File* was selected.

Upload File

This button appears only after you select the *External File* tool.

Click to browse to an existing file to upload. The file can be stored anywhere; however, it must be either a delimited file or a flat (fixed length) file that is compatible with PeopleSoft File Parser.

Note. Proprietary file formats such as Microsoft Excel, Microsoft Word, and Lotus Software's Lotus 1-2-3 are not supported by File Parser. An Excel spreadsheet, for example, would need to be saved as a comma separated value (.csv) file format.

When you upload a file, the system places the file in a path accessible to the applications server and Process Scheduler, and attaches the file to the process.

Attached File

Displays the name of the uploaded and attached file.

Delete File and **View File**

These buttons appear only after you upload a file.

Click View File to view the uploaded file and verify that its contents are mapped correctly for parsing.

Click Delete File to delete the uploaded file from the attachment path.

Create File Mapping

Click to access the Population Selection File Mapping page, where you can map the uploaded file for use with the Population Selection process.

Edit File Mapping

This link appears only after you upload a file and create or select the file mapping.

Click to access the Population Selection File Mapping page, where you can view or edit the mapping created for the uploaded file.

Preview Selection Results

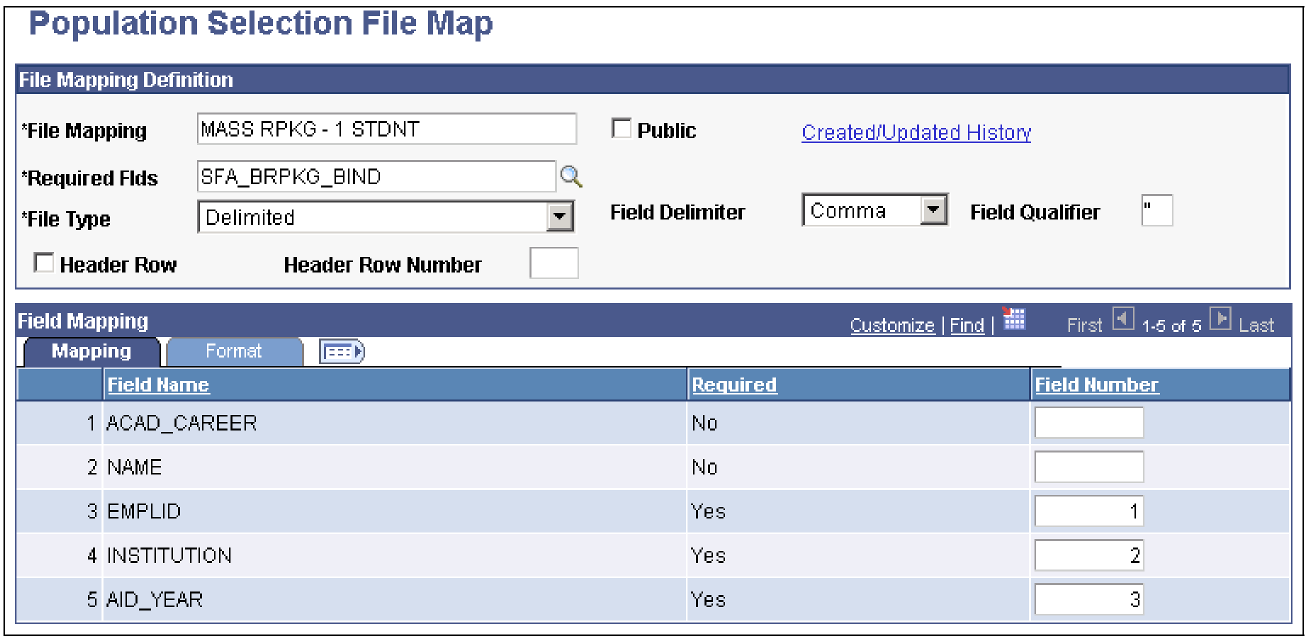
This link appears only if the Enable Preview Resultscheck box is selected on the Selection Tool page for the External File tool.

Click this link to preview results based on the parameters that you selected before you run the process.

Warning! When using an external file selection tool, always preview the results to verify that the contents of your file are mapped correctly for parsing. If you don't verify the mapping, you could have misplaced columns—for example, the column labelled Institution could contain values for the names of the IDs.

External File Mapping

This section shows a completed Population Selection File Map page.



Example of the Population Selection File Map page

Running the Population Update Process

This section provides an overview of the Population Update process and discusses how to set parameters for running the process.

Understanding the Population Update Process

Population Update is a process that uses the Population Selection utility to update values in selected fields. Your institution or department must choose the records and fields to make available for update and set user security to identify which users can update the records. The user selects the records and fields to update on the Population Selection Update run control page.

Each record that can be updated by the process has a query to use for population selection. This query is joined with other records to determine the population that you want to update when you use the PS Query selection tool.

The application records that are configured to use the Population Update process are:

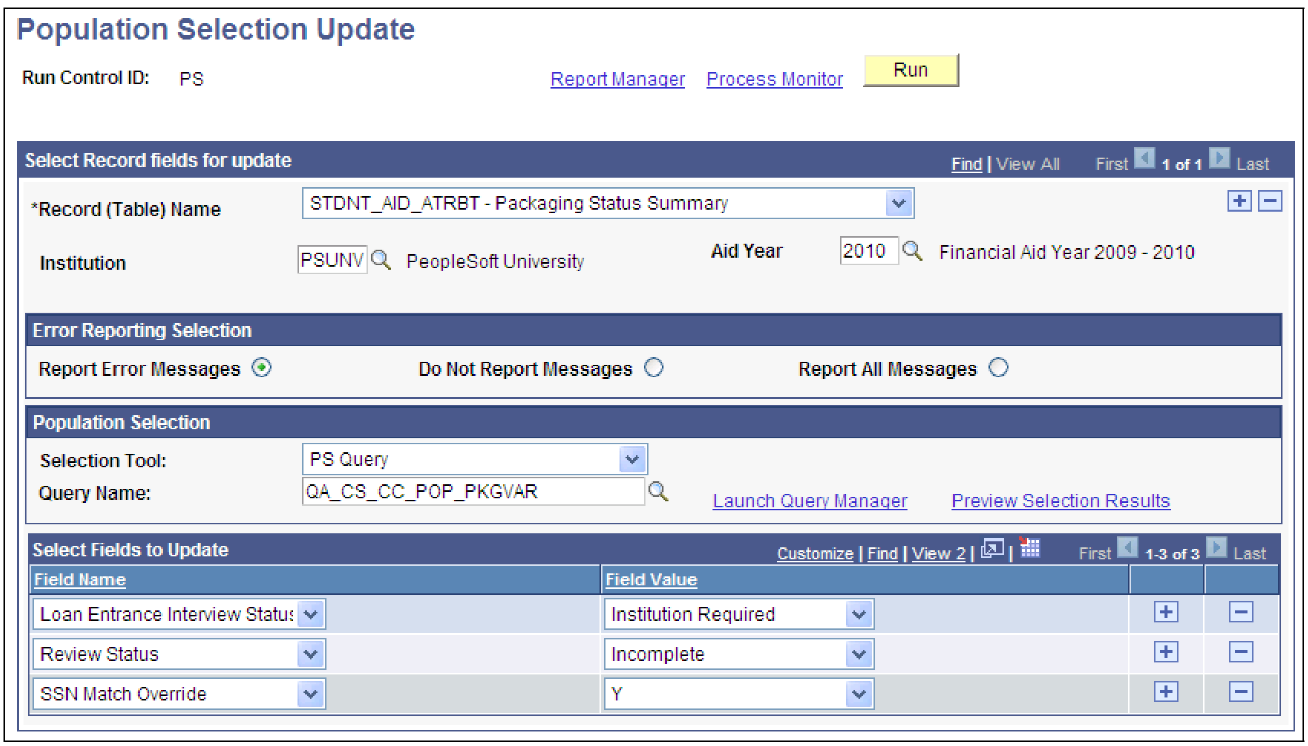
- Admission Application Recruit Cat (ADM_APPL_RCR_CA)
- Admission Prospect Career (ADM_PRSPCT_CAR)
- Records needing INAS Calcs (INAS_CALC_RECS)
- Federal Overrides for INAS (INAS_FED_EXT)
- Profile Overrides for INAS (INAS_PROF_EXT)
- ISIR Internals/Control Data (ISIR_CONTROL)
- Loan Origination Detail (LOAN_ORIG_DTL)
- Loan Disbursement (LOAN_DISBMNT)
- Loan Origination Citizenship (LOAN_ORIGNATN)
- Pell Disbursement (PELL_DISBMNT)
- Pell Origination (PELL_ORIGINATN)
- Pell Origination Detail (PELL_ORIG_DTL)
- Relations with Institution (PERS_INST_REL)
- ACG/SMART Origination Detail (SFA_ASG_ORG_DTL)
- External Award Staging detail record (SFA_EASTAGE_DTL)
- SLC Student Data Table (SFA_SLC_STUDENT)
- Packaging Status Summary (STDNT_AID_ATRBT)
- Student Awards (STDNT_AWARDS)
- Student Career (STDNT_CAREER)
- Tuition Calculation (STDNT_CAR_TERM)
- Student Equation Variables (STDNT_EQUTN_VAR)
- Student FA Term (STDNT_FA_TERM)
- Student Packaging Variables (STDNT_PKG_VAR)

Page Used to Run the Population Update Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Population Selection Update	SCC_RUNCTL_POP_UPD	Set Up SACR, System Administration, Utilities, Population Update, Population Update Process, Population Selection Update	Set parameters for running the Population Update process.

Selecting the Update Parameters

Access the Population Selection Update page (Set Up SACR, System Administration, Utilities, Population Update, Population Update Process, Population Selection Update).



Population Selection Update page

Select Record/Field for Update

Record (Table) Name

Enter the name of the record to update.

Only the records to which you have security access and that your institution or department has made available for updating are available values.

Multiple tables can be updated on one run control. A table can be referenced only once per run control because the table is a key field for the process.

Institution and **Aid Year**

When you enter the record name, the system displays the key fields for that record so that you can specify the exact rows to update in the table.

For example, for Financial Aid records, the Institution and Aid Year fields appear.

Error Reporting Selection

You can choose to have the process display error messages only or all of the messages that it encounters during the update, or you can choose not to display any of the messages. Displaying at least the error messages gives you an opportunity to decide whether to investigate and resolve the problems.

Population Selection

Fields and links in this group box behave as in the standard Population Selection group box throughout Campus Solutions.

Selection Tool

Enter the selection tool that your institution uses to select the population to update: *PS Query, Equation Engine,* or *External File.*

Query Name,Equation Name, or **File Name**

Enter the name of the query, equation, or file that you use to select the population that you want to update.

Select Fields to Update

When you enter the Record (Table) Name, the fields that are available for update become available for selection.

Field Name and **Field Value**

Enter each field that you want to update and enter the value to use.

When you run the Population Update process, the system finds the record and updates the field values with the values that you specify for the records that you have identified using the Population Selection utility.

For the following records you can decide whether to update the existing effective dated row or to insert a new effective dated row:

- ISIR Internals/Control Data
- Student FA Term

The following records have additional functionality:

- Admissions Application Recruitment Category: Optional Batch EIP for this record.
- Admissions Prospect Career: Optional Batch EIP for this record.
- Records needing INAS Calculation: Hardcoded value "P" for Protection Reason.
- Loan Origination Detail: Hold/ UnHold logic, custom XLAT.
- Pell Origination: The date fields associated with Pell Origination Status and Pell Trans Status are also updated with the system date.
- External Award Staging Detail: Custom translate for processing status.
- Student Career: The date field associated with the Synchronize Advisement Report is also updated with the system date.
- Term Activation: The tuition calc required field is set to Y when the Override tuition group is updated.
- Student Equation Variables: Validated against term activation record.
- Student Packaging Variables: Validated against student aid record.

Chapter 47

Using the 3C Engine

This chapter provides an overview of the 3C engine and discusses how to:

- Define 3C engine events.
- Define 3C engine triggers.
- Set 3C engine security.
- View 3C triggers results.
- Run the 3C Engine process.

Understanding the 3C Engine

The 3C engine is a rules-based PeopleSoft application engine that you can integrate with functional transactions to automatically insert or update communications, comments, and checklists records as you interact with students, suppliers, and employees. For example, you can eliminate steps required to manually enter 3C information by setting the 3C engine to automatically insert defined checklists, communications, and comments for prospects as you enter new admissions prospects to the system. You can use online business transactions to invoke 3C engine processing or you can use background integration with certain delivered programs.

Note. The PeopleSoft system delivers two background programs predefined and integrated with the 3C engine. PeopleSoft Contributor Relations Gift Acknowledgement process invokes the 3C engine to record results in the 3C engine trigger results table for background processing, and PeopleSoft user profiles management process invokes the 3C engine to record the real-time system communication inserts.

To use the 3C engine, you use administrative functions and detail data to define the rules (called engine events) to identify the sets of communication, checklists, and comments records that you want the engine to enter or update for you. Then, you can either set your own conditions (called triggers) to invoke the action of entering or updating the 3C records or you can use the predefined triggers delivered with your system. You can also use Population Selection, Triggers, Mass Change or any combination thereof to identify the IDs to process for an event.

If your institution licenses and uses PeopleSoft Campus Self Service, you can configure your system to record in real time, the checklists that you want self-service users to be able to view in the To Do's list self-service transaction. For example, when a prospective student logs onto your self-service site to request application information about your school, after saving the request, the system can record the checklist information that you specify in the engine event definition. When the prospective student logs in the next time, he or she can see the specific tasks that they must accomplish to complete your school's application process.

Defining 3C Engine Events

This section discusses how to define 3C engine events and discusses how to:

- Define 3C engine events.
- Select joint rules compare fields.
- View communication keys.
- View comments.
- View checklists.

Understanding 3C Engine Events

Define 3C engine events to set rules by which the system identifies the sets of communications, checklists, and comments records for the 3C engine to enter or update.

Prerequisites

Before using the 3C engine, you must set up communications, checklists, and comments. If you are going to use communication speed keys (Comm Keys), set those up first, too.

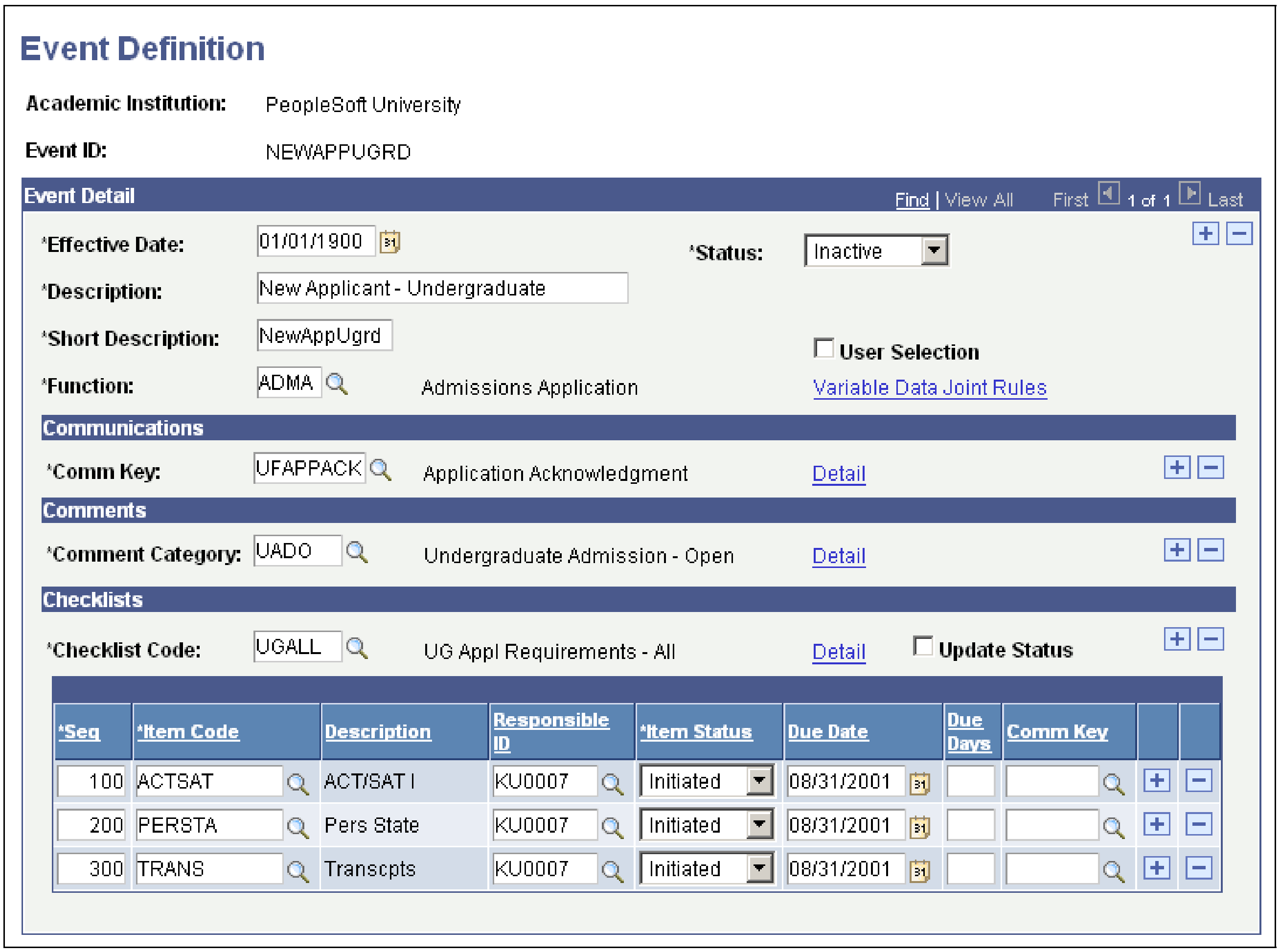
Pages Used to Define 3C Engine Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Definition	EVNT_3CS_SETUP	Campus Community, 3C Engine, Set Up 3C Engine, Event Definition	Define 3C engine events to identify or review the communications, comments, or checklists for the 3C engine to assign or update.
Joint Rules Compare Fields	EVNT_JRULES_AF	Click theVariable Data Joint Rules link on the Engine Event Definition page.	Select joint rules compare fields to identify variable data for the 3C engine to compare in determining and assigning joint communications.
Comm Key Detail (communication key detail)	EVNT_3CS_COMM_SEC	Click the Details link in the Communications area of the Engine Event Definition page.	View Communication Keys to determine or modify data for the communication to assign.

Page Name	*Definition Name*	*Navigation*	*Usage*
Comments Detail	EVNT_3CS_CMNT_SEC	Click the Details link in the Comments area of the Engine Event Definition page.	View or modify the text of the comment to assign.
Checklist Detail	EVNT_3CS_CHK_SEC	Click the Details link in the Checklists area of the Engine Event Definition page.	View or modify the parameters of the checklist to assign.

Defining the 3C Engine Events

Access the Engine Event Definition page (Campus Community, 3C Engine, Set Up 3C Engine, Event Definition).



Engine Event Definition page

Event Detail

Function — Enter the functional area for this 3C engine event.

User Selection — Select this check box to enable users to select the communication, comment, and checklist to assign to transactions for this 3C engine event definition. When selected, the engine assigns only the communication, comment, and checklist specified by the user.

For example, if you license and use the Request Information self-service transaction in PeopleSoft Campus Self Service, you would select the User Selection option when defining a 3C engine event for the web prospects. That way, the prospects can select the communications that they want to receive.

When not selected, the engine assigns all communications, checklists, and comments identified in this 3C engine event.

Variable Data Joint Rules — Click this link to access the Joint Rules Compare Fields page, where you can select the variable data fields that you want the system to compare to determine and assign joint communications.

Communications

Comm Key — Enter the Comm Key to specify the communication to assign as part of this 3C engine event.

Detail — Click this link to access the Event Communication Detail page, where you can view or edit the details of the specified Comm Key.

Comments

Comment Category — Enter the comment category for the comment to assign as part of this 3C engine event.

Detail — Click this link to access the Event Comment Detail page, where you can view or edit the details of the specific comment category.

Checklists

Checklist Code — Enter the checklist code for the checklist to assign as part of this 3C engine event.

Update Status

Select this check box for the 3C engine to update each checklist item to the specified status.

For example, you might include an item on the prospects checklist to require the assignment of a recruiter to each new prospect. You can create a 3C engine event definition to have the system automatically update that checklist item when you enter the new prospect into the database and assign the recruiter.

Sequence

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of checklist items to be assigned as part of this 3C engine event.

Item Code

Enter the checklist item code for the checklist item to assign as part of this 3C engine event.

Available item codes are from the Checklist Item Functions page.

Responsible ID

Enter the ID of the individual at your institution who is responsible for this checklist item.

Item Status

Select the status of the checklist items to assign as part of this 3C engine event.

Due Days

Enter the number of due days associated with the checklist items to assign as part of this 3C engine event.

Due Date

Enter the due date associated with the checklist item to assign as part of this 3C engine event.

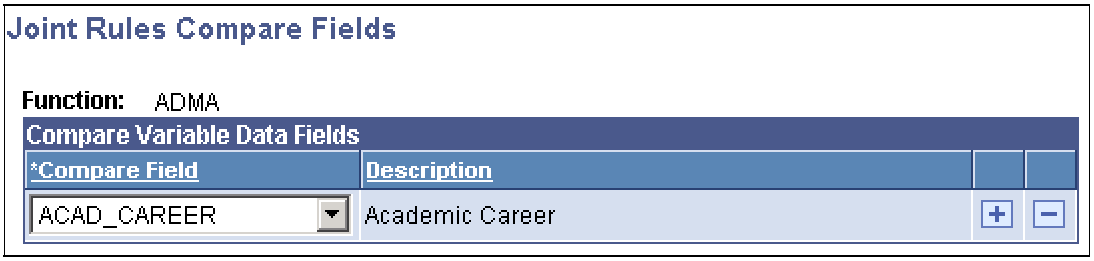
Comm Key

The Comm Key of the checklist to be assigned as part of this 3C engine event.

If the checklist to assign is of the default type that is set on the Installation_CC page (*Communications List* is the delivered default value), the system displays the Comm Key field. You can override this to select a different Comm Key.

Selecting Joint Rules Compare Fields

Access the Joint Rules Compare Fields page (click the Variable Data Joint Rules link on the Engine Event Definition page).



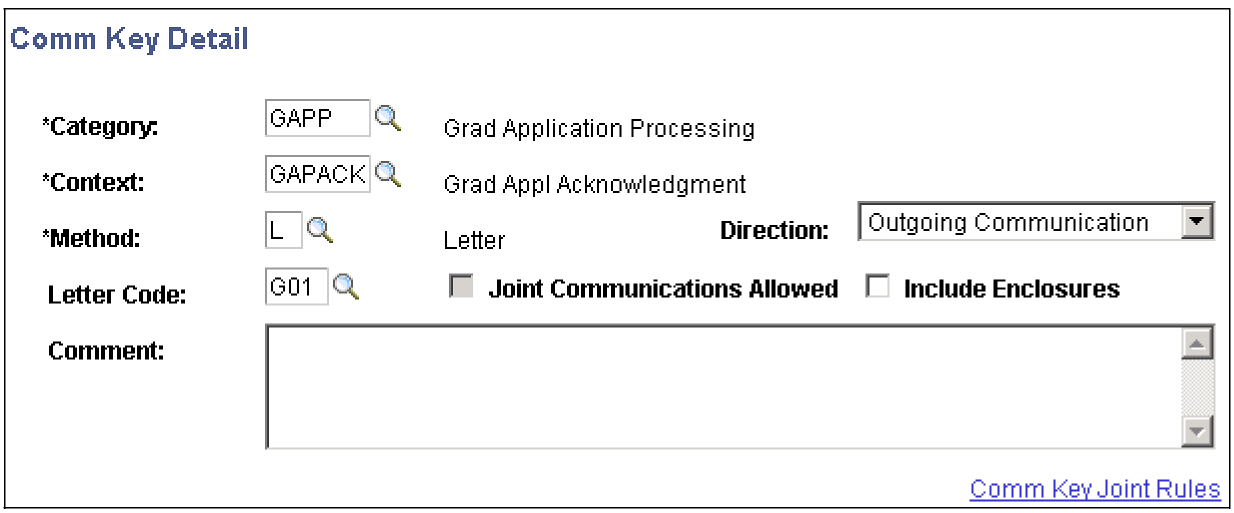
Joint Rules Compare Fields page

Compare Field

If you use joint communications, select the data fields to compare for any two related IDs that are set on the Relationships page to enable joint communications. When the compare finds the same variable data in these fields for both IDs, the condition triggers the assignment of a joint communication for the primary ID.

Viewing Communication Keys

Access the Comm Key Detail page (click the Details link in the Communications area of the Engine Event Definition page).



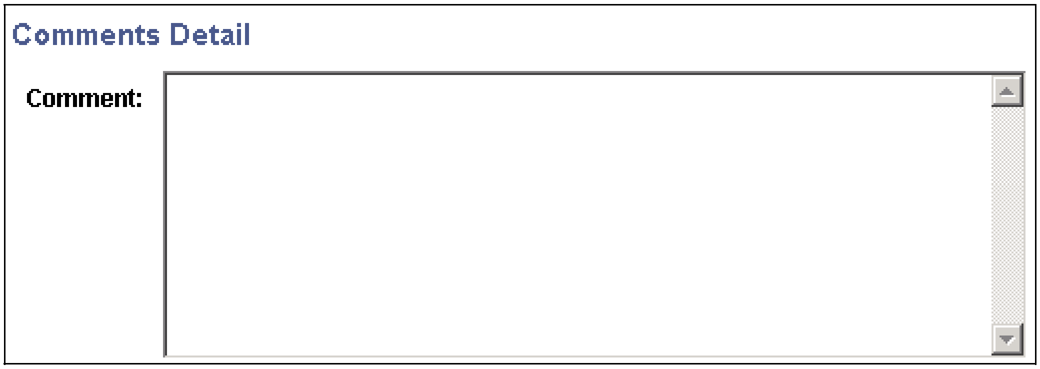
Comm Key Detail page

Data on this page comes from the Communication Speed Key page. You can accept the default data or you can change it. Changing the data here modifies what the 3C engine assigns to individuals or organizations for the Comm Key that you specify. It does not change the data on the Communication Speed Key page.

For example, you might use a particular Comm Key to manually assign communications. You can also use that Comm Key on the 3C event definition, and if you want to make changes that affect only the individuals or organizations to whom the 3C engine assigns communications, you can. Perhaps you have a special condition that occurs and you want to include a special comment on the communication record for those recipients. When you add that comment here, only the communications assigned by this event definition will have that comment. The original Comm Key data remains unchanged.

Viewing Comments

Access the Comments Detail page (click theDetails link in the Comments area of the Engine Event Definition page).

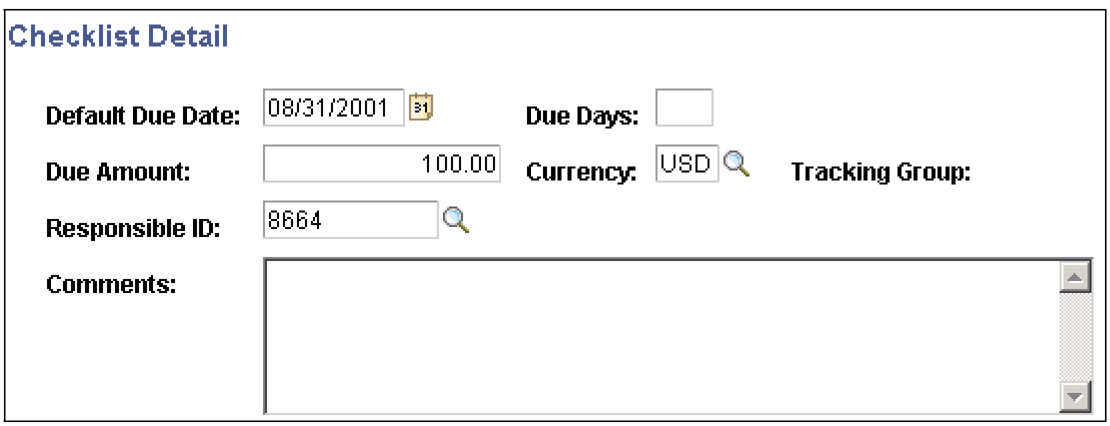


Comments Detail page

You can enter a comment for the 3C engine to assign to all of the IDs processed by the engine event. Entering a comment here does not change any comments entered on the Comment Entry page for those IDs.

Viewing Checklists

Access the Checklist Detail page (click the Details link in the Checklists area of the Engine Event Definition page).



Checklist Detail page

You can use the default data or modify it. You can enter a comment for the 3C engine to assign to all of the IDs that will be assigned to this checklist by the engine event. Changing data and entering a comment here does not change data or any comments entered on the Checklist Management page for those IDs.

Defining 3C Engine Triggers

This section provides an overview of 3C engine triggers and discusses how to:

- Map trigger prompts.
- Identify trigger conditions.

Understanding 3C Engine Triggers

Online triggers are conditions that you define to indicate when to invoke 3C engine processing. You can define triggers to occur in real time or to store in a trigger table for background processing later. Triggers are table specific. They identify record or field level conditions and associate the 3C engine event definition to use when the trigger conditions are met by creating, changing, or deleting data in the system.

The 3C engine online triggers are integrated with the system by using a PeopleCode function. The function evaluates certain key variable information provided in the PeopleCode placed in the transactional locations. You must define certain variable assignment values when you place this PeopleCode in other records or components. The following PeopleCode example identifies and describes these variables.

For example, the Trigger3CEngine function call placed on the ADM_APPL_DATA record in your system has these variable assignments.

```
Declare Function Trigger3CEngine PeopleCode FUNCLIB_CS.EVENT_3CS_ID FieldFormula;

PanelGroup string &ID, &RECNAME, &ACTION, &OVERRIDE, &VAR_DATA, &INSTITUTION;

&ID = "EMPLID";
&RECNAME = "ADM_APPL_DATA";
&ACTION = "N";
&OVERRIDE = "N";
&VAR_DATA = ?Y?;
&INSTITUTION = ADM_APPL_DATA.INSTITUTION;
Trigger3CEngine();
```

The PeopleSoft system delivers some predefined 3C engine PeopleCode function calls. You can use the EmplID (SavePostChange) field on these records:

- ADM_APPL_DATA
- ADM_APPL_PROG
- ADM_PRSPCT_CAR
- ADM_PRSPCT_PROG
- ADM_WEB_PRS_CAR

You can configure your system to provide 3C engine integration in other areas by placing the PeopleCode function call in the appropriate records or components in these ways:

- Place the Trigger3CEngine function call in any record or component-record location.

- Place the Trigger3CEngine function call only in the SavePostChange PeopleCode event.
- Place the Trigger3CEngine function call only in locations where a person ID (EMPLID or similar field) or organization ID (EXT_ORG_ID or similar field) is included in the component.

After you identify and place the appropriate Trigger3CEngine function, you must define the online triggers.

You can view 3C engine triggers in the Trigger Result table before running the 3C engine trigger background process. You can also add individuals or organizations to the trigger table before initiating the background assignments.

Trigger definitions set to process assignments in background add rows to the Trigger Result page as users perform the business transactions that meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to *batch* for the trigger, each time a new applicant is added to the database, the 3C engine inserts a row on the Trigger Result page for the new applicant.

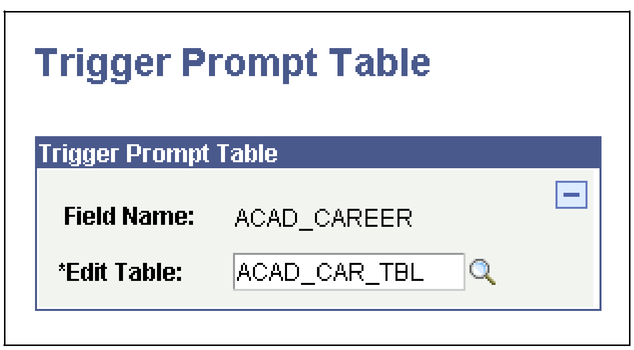
Note. Trigger definitions set to *system* mode do not add rows to the Trigger Result table as business transactions are performed.

Pages Used to Define 3C Engine Triggers

Page Name	*Definition Name*	*Navigation*	*Usage*
Trigger Prompt Table	TRGR_PROMPT_TBL	Campus Community, 3C Engine, Set Up 3C Engine, Trigger Prompt Table	Map trigger prompts identifying the edit table to use with the trigger fields.
Trigger Definition	TRGR_3CS_ON_SETUP	Campus Community, 3C Engine, Set Up 3C Engine, Trigger Definition	Identify trigger conditions to invoke the 3C Engine.

Mapping Trigger Prompts

Access the Trigger Prompt Table page (Campus Community, 3C Engine, Set Up 3C Engine, Trigger Prompt Table).



Trigger Prompt Table page

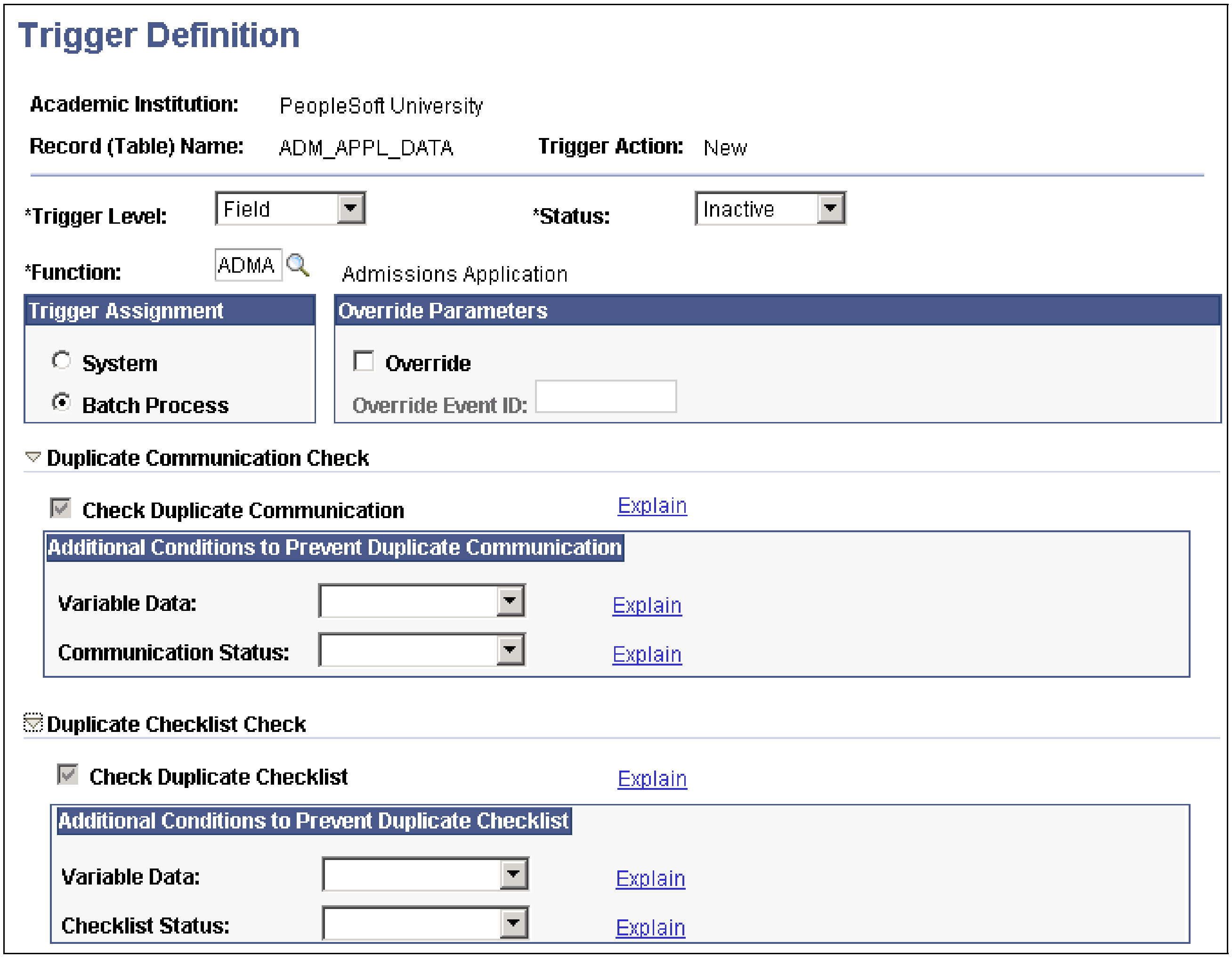
Edit Table

Enter the source record that contains the field conditions to use on the Engine Trigger Definition page. Mapping to an edit table is optional. For example, to make academic career (ACAD_CAREER) values available from the Engine Trigger Definition page, map to the Academic Career Table (ACAD_CAR_TBL).

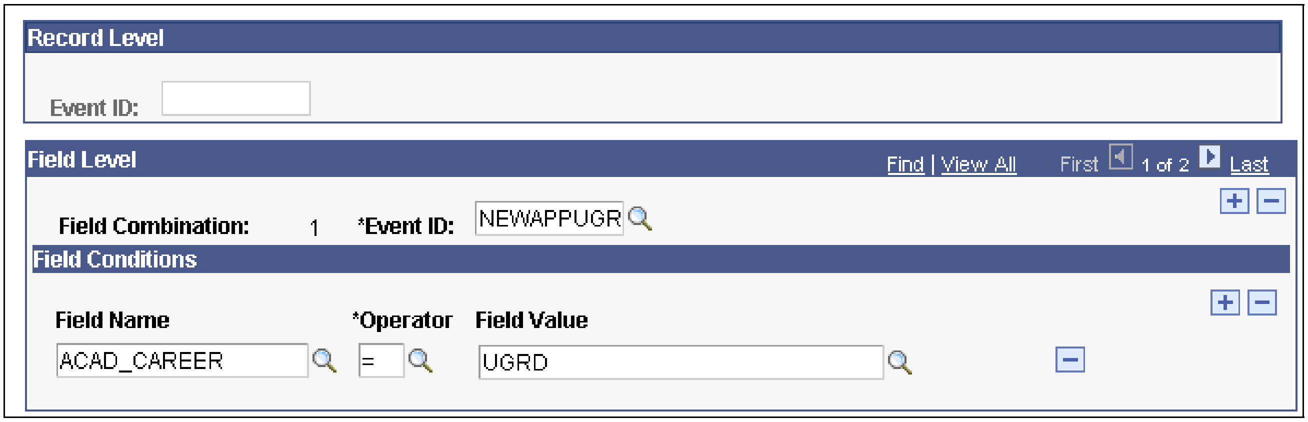
You can delete the Trigger Prompt definition from the Trigger Prompt Table by using the Delete button on the page.

Identifying Trigger Conditions

Access the Trigger Definition page (Campus Community, 3C Engine, Set Up 3C Engine, Trigger Definition).



Trigger Definition page (1 of 2)



Trigger Definition page (2 of 2)

Trigger Action

The system displays the action *(New (add)*, *Change*, or *Delete)* that you selected. The action must occur as described on this page to invoke the 3C engine.

Note. The SavePostChange PeopleCode must use the same add, change, or delete action that you define here.

Trigger Level

Select the level at which this action must occur to invoke the 3C engine.

Record: The specified trigger action on the row invokes the 3C engine process, regardless of field. You must specify the 3C engine Event ID to process for a record level trigger.

Field: The specified trigger action on the field invokes the 3C engine process. You must specify the Event ID to process and the fields on which the specified action occurs, to invoke the 3C engine.

Function

Enter the functional area (administrative function) for this event trigger.

Trigger Assignment

System

Select this check box to insert or update in real time, the communications, comments, and checklists specified in the 3C engine event ID.

Batch Process

Select this check box to indicate that when the specified action occurs to the record or field, the system should insert a row on the Engine Trigger Results page for use by 3C engine background processing later.

Override Parameters

Override

Select this check box to prevent the 3C engine from using the field or record conditions identified on this page, and, instead, use the logic configured around the Function Trigger3CEngine PeopleCode on the record or component location.

If you select the Override option, you must specify the overriding 3C engine event ID to use.

Override Event ID

Enter the 3C engine event to process when the Override option is selected.

Duplication Communication Check

Check Duplicate Communication

Enter the 3C engine event to use to determine if a communication is a duplicate and to assign or prevent assignment according to the defined conditions.

Duplicate Checklist Check

Check Duplicate Checklist

The 3C engine event that determines if a checklist is a duplicate and assigns or prevents assignment according to defined conditions.

Record Level

Event ID

Enter the 3C engine event to process when the trigger level is *Record.*

Field Level

Field Combination

The system displays the next sequential field combination for each field level event ID that you add.

Event ID

Enter the 3C engine event to process when the trigger level is *Field* and the specified field conditions are met.

Field Conditions

You can define multiple field combination conditions. When the specified trigger action meets any of the conditions, the 3C engine processes the specified field level 3C engine event.

Field Name

Enter the name of the field on the specified record that, when this trigger action is performed, must meet the specified condition to invoke the 3C engine.

Operator

Enter the conditional operator for this field condition and the value that it modifies—for example, the admission term field *(ADMIT_TERM)* must be greater than or equal to 0390 (March 1990).

Values for this field are delivered with the system as translate values. You can modify these translate values:

<Less than.

<= Less than or equal to.

<>Not equal.

= Equal to.

>Greater than.

>= Greater than or equal to.

IN: In.

Setting 3C Engine Security

This section provides an overview of 3C engine security and discusses how to assign engine event 3C groups.

Understanding 3C Engine Security

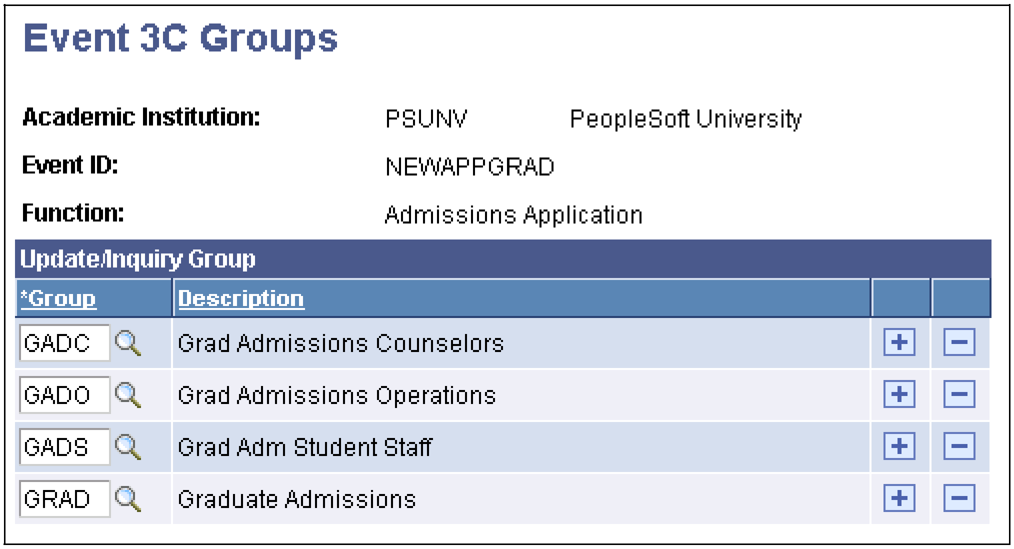
You use 3C groups to set security for 3C engine events just as you do to set security for communications, checklists, and comments outside of the scope of the 3C engine. A user can then trigger only the events within the 3C group to which he or she is assigned. When the trigger is invoked online, the PeopleCode function assigns only those engine events for which that user has inquiry or update access. If the user does not have security access for the engine event, the system ignores the assignment.

Page Used to Set 3C Engine Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Event 3C Groups	EVNT_GRP_3C_TABLE	Campus Community, 3C Engine, Set Up 3C Engine, Event 3C Groups	Assign engine event 3C groups to assign security to 3C engine event definitions.

Assigning Engine Event 3C Groups

Access the Event 3C Groups page (Campus Community, 3C Engine, Set Up 3C Engine, Event 3C Groups).



Event 3C Groups page

Add the groups that should have security access to this event ID.

Viewing 3C Engine Trigger Results

This section provides an overview of trigger results and discusses how to:

- View 3C trigger results.
- View additional trigger result details.

Understanding Trigger Results

You can review the 3C engine triggers on the 3C Engine Trigger Results page before running the 3C engine trigger background process to assign the communications, checklists, and comments in batch. You can also add individuals or organizations to the trigger table before initiating the batch assignments.

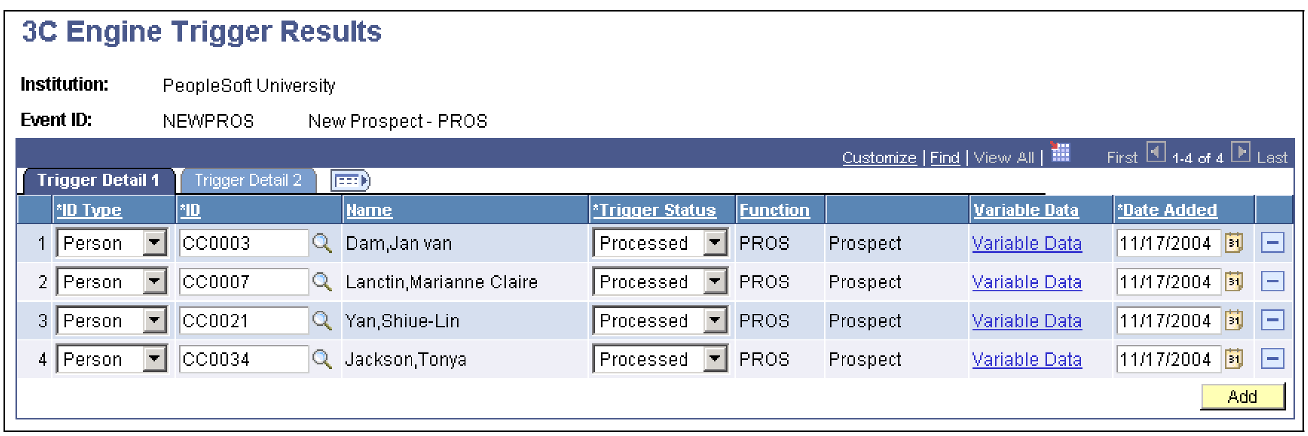
Trigger definitions that are set to process assignments in batch add rows to the 3C Engine Trigger Results page as users perform the business transactions that meet the trigger conditions. For example, you can define a trigger to invoke the 3C engine when a new applicant is added. If you set the process mode to batch for this trigger, each time a new applicant is added to the database, the 3C engine inserts a row for the applicant on the Trigger Result page.

Pages Used to View 3C Engine Trigger Results

Page Name	*Definition Name*	*Navigation*	*Usage*
3C Engine Trigger Results	TRGR_3CS_TABLE	• Campus Community, Checklists, 3C Engine Trigger Results • Campus Community, Communications, 3C Engine Trigger Results • Campus Community, Comments, 3C Engine Trigger Results • Campus Community, 3C Engine, 3C Engine Trigger Results	View trigger results to determine the individuals or organizations to which the 3C engine background process assigns the communications, comments, or checklists.
Variable Data	TRGR_PROS_SEC	Click the Variable Data link on the Trigger Result page, Trigger Detail 1 tab.	View or change the variable data for the targeted individual or organization.

Viewing Trigger Results

Access the 3C Engine Trigger Results page (Campus Community, [Checklists, Communications, Comments, or 3C Engine] 3C Engine Trigger Results).



3C Engine Trigger Results page - Trigger Detail 1 tab

Trigger Detail 1 tab

ID Type Specify the type of ID, either *Person* or *Organization.*

ID

The system displays the ID of the person or organization for the 3C engine to process.

Trigger Status

Select the status of the trigger process to use for the specified individual or organization.

By default, when the 3C engine adds a row in the trigger table, it sets the trigger status to *Processed.* You can override this value.

Rows set with the status of *Processed* are the only rows processed by the 3C engine. To temporarily disable a row from being processed, perhaps to do some investigation, you must set the trigger status to something other than *Processed.* The other values are: *Cancelled*,*Error*,*In Process*,*Suspense*, or *Unprocessed.* These values are delivered with the system as translate values. You should not modify the delivered values, but you can add others.

You can reset the trigger status to *Processed* to include it in the next run of the process. When you run the 3C engine process, the rows set to *Processed* are deleted, leaving only the rows manually set to a different trigger status.

Function

The system displays the administrative functional area of this 3C engine event.

Variable Data

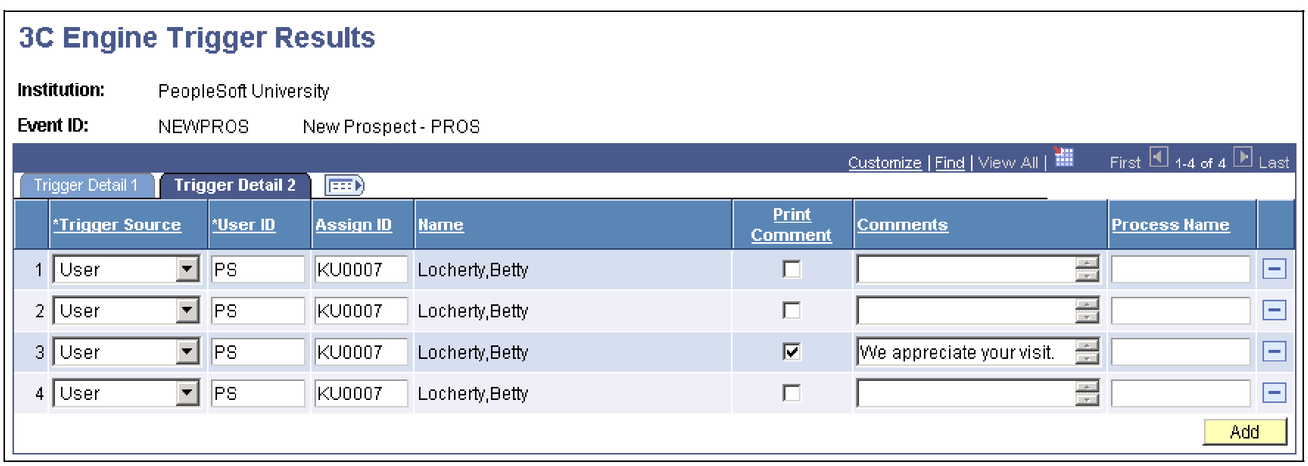
Click this link to access the Variable Data page, where you can view or change the variable data associated with this individual or organization.

Date Added

Enter the date when this ID is added to the trigger. The default date is the current system date. You can override this value.

Viewing Additional Trigger Result Details

Access the 3C Engine Trigger Results page, Trigger Detail 2 tab (click the Variable Data link on the Trigger Result page, Trigger Detail 2 tab).


3C Engine Trigger Results

Institution: PeopleSoft University

Event ID: NEWPROS New Prospect - PROS

Customize | Find | View All | First 1-4 of 4 Last

Trigger Detail 1 | Trigger Detail 2

	*Trigger Source	*User ID	Assign ID	Name	Print Comment	Comments	Process Name
1	User	PS	KU0007	Locherty,Betty	☐		
2	User	PS	KU0007	Locherty,Betty	☐		
3	User	PS	KU0007	Locherty,Betty	☑	We appreciate your visit.	
4	User	PS	KU0007	Locherty,Betty	☐		

Add

3C Engine Trigger Results page - Trigger Detail 2 tab

Trigger Detail 2

Trigger Source	Select the source to use to determine the individuals or organizations to include in this process. *Batch:* The system automatically sets the trigger source to this value when the 3C engine background process processes this ID. *Online:* The system automatically sets the trigger source to this value when a business transaction within the system triggers the 3C engine to process this individual. *User:* The system automatically sets the trigger source to this value when you click Add to add a row and enter an additional ID on the Trigger Detail 1 tab page.
User ID	Enter the ID of the user performing the business transaction that invoked the 3C engine trigger or the ID of the user who initiated the run of the process that resulted in the addition of this row.
Assign ID	Enter the ID of the individual responsible for assigning this trigger.
Print Comment	Select this check box to include the comments in the Letter Generation data extract process.
Comments	The system displays the comments from the Event Definition detail page. You can change the comments and add enter additional comments.
Process Name	The 3C Engine does not use this field. You can use this field to process the ID using a different process, for example *Manual* or *Legacy* process.

Running the 3C Engine Process

This section provides an overview of the 3C engine process and discusses how to:

- Specify 3C engine process parameters.
- Manage duplicate communication assignments.

Understanding the 3C Engine Process

Use PeopleSoft Process Scheduler to run the 3C engine background process and process 3C events in the background at a future time. You can run the process by selecting the IDs stored in the trigger table results, or by selecting the IDs using mass change definitions or Population Selection, or a combination of the three.

When you run the background process on a selected population, the communications, comments, and checklists identified by the 3C engine event are added or updated for the individuals or organizations identified by the population selection tool that you identify.

When you run the background process on trigger table results, the communications, comments, and checklists identified by the 3C engine event are added or updated for the individuals or organizations that the trigger added to the Trigger Result page.

When you run the background process on mass change groups or definitions, the 3C engine uses the selection criteria definition and certain other mass change definitions to identify the individuals or organizations for which to add or update communications, checklists, and comments.

You can also specify conditions for the 3C engine to prevent assignment of duplicate communications.

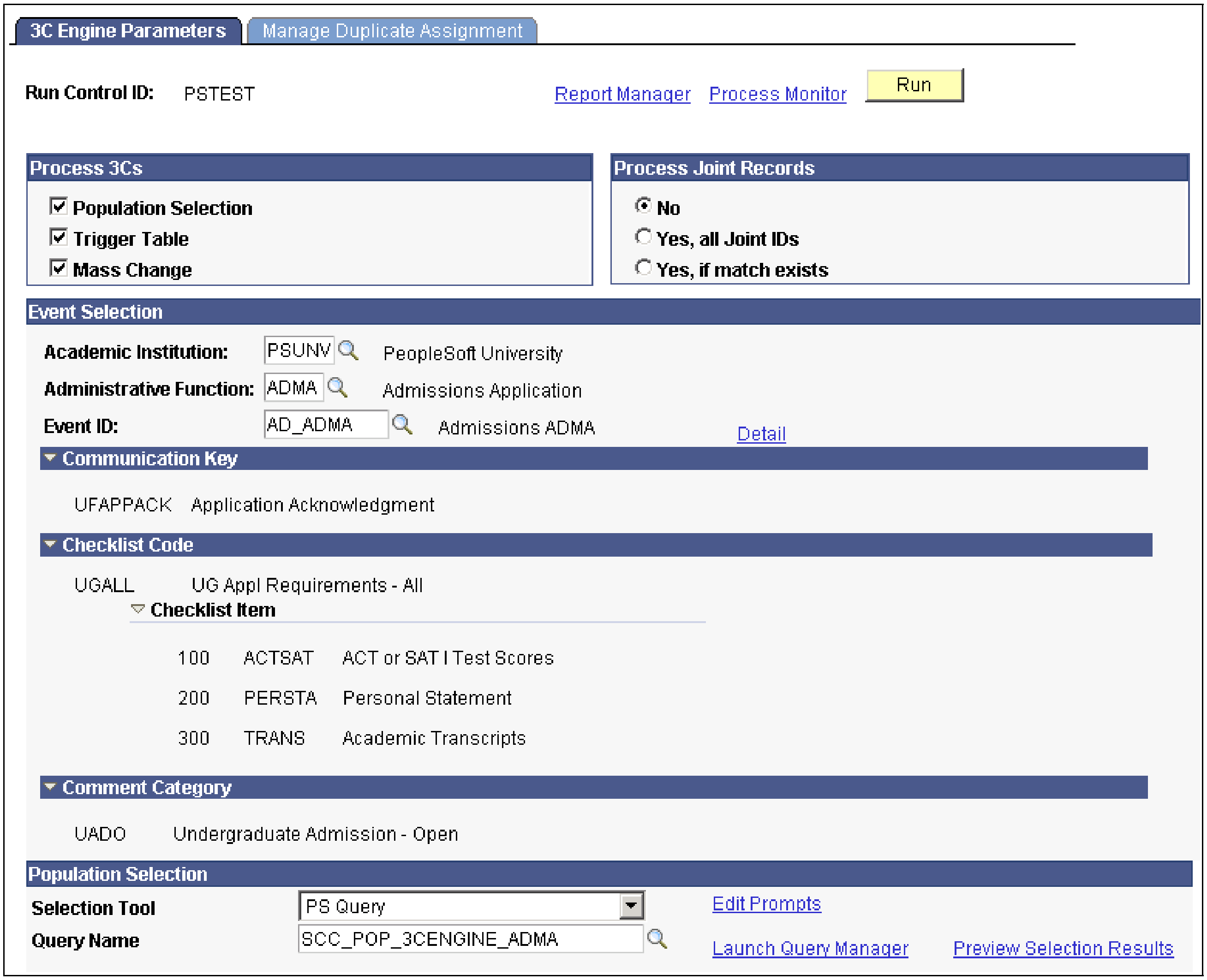
Pages Used to Run the 3C Engine Process

Page Name	***Definition Name***	***Navigation***	***Usage***
3C Engine Parameters page	RUN_CNTL_3CENGINE	Campus Community, 3C Engine, Run 3C Engine, 3C Engine Parameters page	Select how, what, and for whom the 3C engine background process is process.
Event Definition page	EVNT_3CS_SETUP	Click the Detail link next to the Event ID field on the 3C Engine Parameters page.	View details of the event specified for the 3C engine background process to use.
Equation Editor page	EQUATION_EDITOR	Click the Create Equation link, which appears beside the Equation Name field on the 3C Engine Parameters page when Process 3C's is set to *Population Selection* and the selection tool is *Equation Engine.*	Select an equation for the 3C engine background process to use for population selection.
Population Selection File Mapping page	SCCFP_PS_FILE	Click the Create File Mapping link, which appears beside the empty File Mapping field on the 3C Engine Parameters page when Process 3Cs is set to *Population Selection* and the selection tool is *External File.* Click the Edit File Mapping link, which appears beside the populated File Mapping field on the 3C Engine Parameters page when Process 3Cs is set to *Population Selection* and selection tool is *External File.*	Create or edit a mapping so that the 3C engine background process can use the uploaded file to identify the desired population.

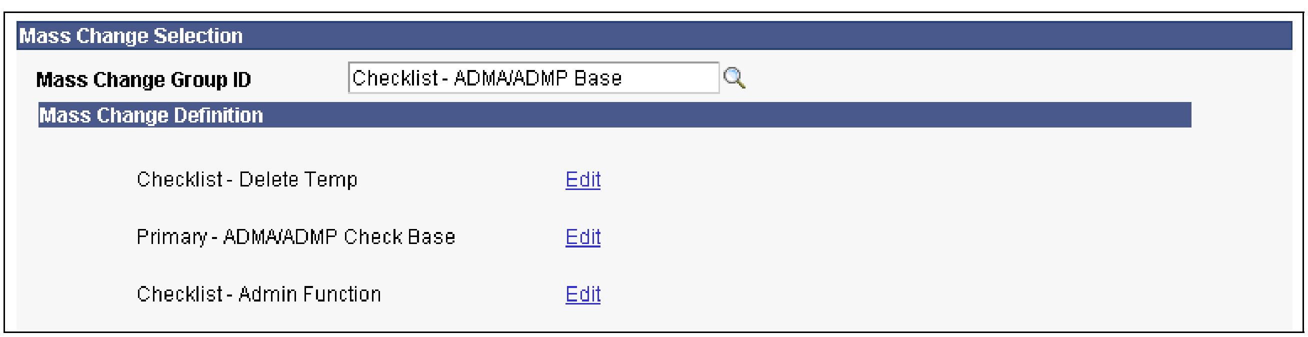
Page Name	***Definition Name***	***Navigation***	***Usage***
Query Manager page	QRY_SELECT	Click the Launch Query Manager link, which appears beside the Query Name field on the 3C Engine Parameters page when Process 3Cs is set to *Population Selection* and the selection tool is *PS Query*.	View or create a query for the Population Selection process to use.
Student Administration page	MC_DEFN_SA	Click the Edit link, which appears beside a Mass Change definition on the 3C Engine Parameters page when Process 3Cs is *Mass Change.*	View or edit a mass change definition.
Manage Duplicate Assignment	MANAGE_DUP_ASSIGN	Campus Community, 3C Engine, Run 3C Engine, Manage Duplicate Assignment	Specify conditions for preventing duplicate communication and checklist assignment.

Specifying 3C Engine Process Parameters

Access the 3C Engine Parameters page (Campus Community, 3C Engine, Run 3C Engine, 3C Engine Parameters page).



3C Engine Parameters page (1 of 2)



3C Engine Parameters page (2 of 2)

Process 3Cs

Group boxes and fields appear on this run control page based on the process that you select: *Population Selection, Trigger Table, Mass Change,* or any combination thereof.

Population Selection — Select to use the Population Selection process to identify the IDs for the 3C engine to process for the event that you specify.

When selected, the Event Selection and Population Selection group boxes become available.

Note. The Population Selection check box is not visible if the population selection context for the 3C Engine does not allow this menu navigation to use Population Selection to select the IDs to process.

Trigger — Select to have the 3C engine process the rows on the 3C Engine Trigger Results page for the event that you specify.

When selected, the Event Selection group box becomes available.

Mass Change — Select to have the 3C engine process the mass change group ID data for the event that you specify.

When selected, the Mass Change Selection group box becomes available.

Event Selection

This group box appears when you select *Population Selection* or *Trigger Table,* or both.

Academic Institution — Enter the institution whose data this program should process.

Administrative Function — Enter the functional area of the data to process.

The field values that appear or become available on the rest of the page are based on the administrative function that you enter.

Event ID — Enter the 3C engine event ID to process.

Detail — Click to access the Event Definition page for the specified event ID where you can view or update the event definition and determine which communications, checklists, and comments the definition includes.

Joint Processing

This group box appears for all selections.

No — Select this option if you do not want to apply joint communication rules to this process.

Yes, All Joint IDs — Select this option to apply joint communication rules and include all communications set to enable joint communications.

Yes, if match exists — Select this option to apply joint communication rules and include joint communications only when dates in the variable data fields match.

Communication Key, Checklist Code, and Comment Category

These group boxes appear when you select *Population Selection* or *Trigger Table*, or both. They do not appear for *Mass Change* because the communication key is selected from inside the mass change definition.

The system displays the Comm Key for the checklist code and checklist item and the comment category associated with the event ID that you entered. The 3C engine adds or updates these items for the IDs identified by the processes you selected .

Population Selection

This group box appears when the *Population Selection* process is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a 3C engine transaction, you must use it.

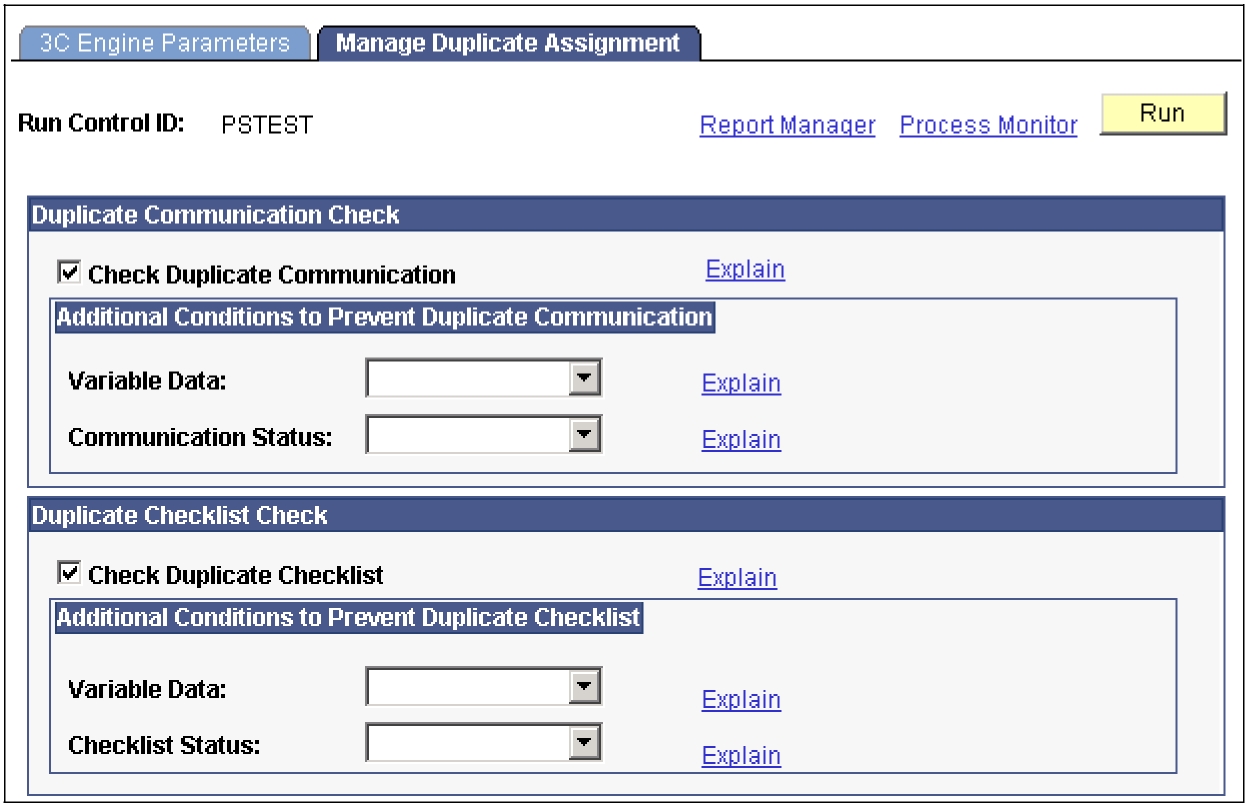
Mass Change Selection

This group box appears when you select *Mass Change.*

Mass Change Group ID	Enter the group ID to process.
Mass Change Definition	Displays the mass change definitions that are assigned to the specified Mass Change Group ID.
Edit	Click to access the Student Administration page of the Mass Change component where you can view and edit the specific mass change definition.

Managing Duplicate Communication Assignments

Access the Manage Duplicate Assignment page (Campus Community, 3C Engine, Run 3C Engine, Manage Duplicate Assignment).



Manage Duplicate Assignment page

Click the Explain link beside any item to display a message explaining the options and function of that item.

Duplicate Communication Check

Check Duplicate Communication

Select this check box to require the 3C engine to determine if a communication is a duplicate before assigning it.

When this option is selected and no additional conditions are specified, the engine does not assign the duplicate if it finds that a communication of that letter code is already assigned.

When this check box is not selected, the engine assigns the communication, whether or not it is a duplicate.

To evaluate if two communications are the same, the 3C engine compares these fields:

Label Name	*Record Name*
ID Type	SA_ID_TYPE
ID	COMMON_ID
Institution	INSTITUTION
Administrative Function	ADMIN_FUNCTION

Label Name	*Record Name*
Communication Category	COMM_CATEGORY
Communication Context	COMM_CONTEXT
Communication Direction	COMM_DIRECTION
Letter Code	LETTER_CD
ID Related	EMPLID_RELATED
Joint Communication	JOINT_COMM
Include Inclosure	INCLUDE_INCL

Additional Conditions to Prevent Duplicate Communication

Enter values in this area to specify whether the engine should compare variable data and status to further identify duplicates and prevent assignment.

Variable Data

Specify the variable data conditions under which duplicates should not be assigned.

Match: If a communication matches a previously assigned communication and they have matching variable data, do not assign the communication.

Do Not Match: If a communication matches a previously assigned communication and their variable data do not match, do not assign the communication.

(Blank): Do not consider variable data.

Communication Status

Specify the communication status under which duplicates should not be assigned.

Completed: If a communication matches a previously assigned communication for which the status is completed, do not assign the communication.

Not Completed: If a communication matches a previously assigned communication for which the status is not completed, do not assign the communication.

(Blank): Do not consider communication status.

Note. If a variable data and a communication status condition are both specified, then *both* conditions must be met to prevent assignment of the duplicate communication.

Duplicate Checklist Check

Check Duplicate Checklist

Select this check box to require the 3C engine to determine if a checklist is a duplicate before assigning it. When this option is selected and no additional conditions are specified, the engine does not assign the duplicate if it finds that a similar checklist code is already assigned.

When this check box is not selected, the engine assigns the checklist, whether or not it is a duplicate.

To evaluate if two checklists are the same, the 3C engine compares these fields:

Label Name	***Record Name***
ID Type	SA_ID_TYPE
ID	COMMON_ID
Checklist Code	CHECKLIST_CD
Institution	INSTITUTION
Administrative Function	ADMIN_FUNCTION

Chapter 48

Managing Communications

This chapter lists prerequisites and common elements, provides overviews of communication management and joint communications, and discusses how to:

- Assign communications.
- Use the Letter Generation process.
- Use the Communication Generation process.
- Review communications.
- Use the Envelope and Label Generation process.
- Delete communications.

Understanding Communication Management

Communication management enables you to track and analyze all of your institution's contacts with students, staff, constituents, and organizations inside and outside the institution. You can track:

- All incoming and outgoing communications.
- All types of communication—letters, email, phone calls, personal contact, facsimiles, and so on.
- Communications generated by other offices that affect your office.
- All staff involved with a communication.

You can also assign communications to individuals, organizations, and groups of people.

To assign a communication, you must select the method, category, context, direction, and letter code for that communication to identify basic information about the communication, such as the who, what, when, and how of each communication, which correlate in this way:

- Method = How
- Context = What
- Category = Why
- Direction = Where
- Date = When

- ID = Who

Use the communication management pages to manually assign communications to individuals or organizations. You can access the communication management pages as described here, or you can access them by clicking the Communication button on pages throughout the system.

You can assign communications to individuals and organizations manually, or you can use the 3C engine to automatically assign communications to individuals or organizations based on rules and conditions that you define.

You can indicate whether the communication is a phone conversation, a letter, or an in-person meeting with the individual. If the communication is an outgoing softcopy document, you can, with either Letter Generation or Communication Generation, manage the variable data and enclosures to include, and enter comments that you can choose to print or not print in the output. With Communication Generation, you can also manage variable data, attachments to include, and comments to include or exclude in an outgoing email. With Communication Generation, you can also send an outgoing communication based on the student's preferred method of either letter or email, and send it in any language supported by your institution that is set at the student's preferred language.

In addition to creating communications for individuals, you can create communications for organizations. For example, you can send letters to schools announcing that an admissions counselor from your institution will be in their area on a certain date, or you can send bills to companies with which your institution does business.

When you assign a communication, you must identify the data to extract about the recipients and select the code from the Standard Letters table to identify the template to use. For Letter Generation, you use your institution's word processing software to merge the data into a template created with that software and associated with the letter code, or into one of the sample Microsoft Word templates that the PeopleSoft application delivers. For Communication Generation, you identify the data source from which to extract data, associate it with the XML report definition, and associate the report with the standard letter code.

Use the inquiry pages to review communication information for an individual or an organization. You can enter criteria and search for a summary of communications or view details of the communication assignments. You can search for a summary of communications to determine if a specific communication was sent, if it included enclosures, or if it was a joint communication.

Note. You are able to view only those communications that are associated with the communication 3C groups to which you have security access. With 3C group inquiry access, you can view communication assignments, but you cannot change them. With 3C group update access, you can view and change the communications. Use the Operator 3C Groups Summary page to determine or change an individual's 3C group security status.

This procedure provides a high-level overview of the managing communications processes and the order in which they must be performed. Steps 1 through 5 are described in Setting Up Communications.

To generate and manage communications:

1. Set up codes for the standard letters that your institution wants to use.

   Each letter requires an administrative function.

2. Set up communication contexts.

   Contexts include methods, directions, and letter codes.

3. Set up communication categories.

   Categories are sets of communication contexts.

4. Set up communication 3C groups.

   3C groups are required for assigning security access for communications.

5. (Optional) Set up communication speed keys (Comm Keys).

   Comm Keys enable you to associate communication elements together and access them as a set, using the assigned shortcut code.

6. Assign communications to individuals or organizations.

   You can assign communications manually or you can use the 3C engine to assign communications automatically in real time or in the background.

7. Review communications assigned to individuals or organizations.

   You can review the details of each communication. You can view a list of all communications assigned to them. You can also review the security access that users have for viewing or updating the communications.

8. Generate the communications.

   You can use either the Letter Generation process to generate letters or the Communication Generation process to generate letters and emails. The Letter Generation process extracts data that you can then, using your word processing software, merge into letter templates. The Communication Generation process extracts only the data specified in the source file and merges it immediately into the associated Oracle BI Publisher templates for letters or emails. For emails, the process also sends the generated outputs to the extracted email addresses.

9. Review the data that was extracted for each of the IDs processed.

Understanding Joint Communications

PeopleSoft Campus Solutions enables you to communicate jointly with individuals at a common address rather than producing separate communications for each individual. For example, you can invite a married couple or two roommates to an event by sending a single invitation to their joint address.

Functions on the relationships and communications pages enable you to create joint communications for two individuals when at least one of the individuals exists in your database.

Detailed information about each page where you select an option or enter data to manage joint communications is included in the appropriate places throughout the documentation. The following procedure provides a high-level overview of the process and indicates where the relevant pages are documented.

To set up joint communications functionality:

1. Design how the two names appear in the greeting and in the address portion of the letter by setting up the joint salutation on the Joint Salutation Type Table page.

   and Chapter 2, "Designing Campus Community," Establishing Salutations, page 31.

2. Set the Default Salutation Type on the Installation Defaults - CC page.

   If no default salutation type is defined, the letter generation data extract process fails.

   and Chapter 2, "Designing Campus Community," Reviewing or Defining Campus Community Installation Settings, page 8.

3. Create joint usages on the Name Usage page.

   Always include the default salutation type (from step 2) in usage orders for joint communications so that the process does not fail due to the lack of a salutation.

   and Chapter 2, "Designing Campus Community," Establishing Name Usages, page 25.

To generate a joint communication:

1. Set the letter code on the Standard Letters page to Allow Joint Communication.

   and Chapter 22, "Setting Up Communications," Defining Letter Codes, page 260.

2. Create the relationship on the Relationship page for the individual in your database.

   Click the Manage Joint Communication button to access the Joint Communication Management page, where you set the relationship to Create Joint Communication, and define the joint salutation.

   and Chapter 36, "Managing Biographical Information," Managing Relationships Data, page 471.

3. Identify the address to use for the joint communication and select the Joint Address check box on the Relationship Address page.

   and Chapter 36, "Managing Biographical Information," Managing Relationships Data, page 471.

4. Assign the communication to the individual in your database; if both individuals are in your database, assign the communication to only one.

   You can use the 3C engine to detect the related records and automatically assign the joint communication, or you can assign the communication manually on the Person Communication page, where you assign communications to individuals.

   Select the Create Joint Communications check box on the Person Communication page. This check box is available for selection based on steps 1 and 2 and when the ID has a relationship set to enable joint communications and the letter code is set to enable joint communications.

   and Chapter 47, "Using the 3C Engine," page 749.

   and Chapter 48, "Managing Communications," Assigning Communications, page 779.

5. Run the Letter Generation or the Communication Generation process to create an extract file containing data for the joint IDs, including the specified joint salutation and joint address.

   The Communication Generation process extracts the joint email address specified in the Relationships component.

   and Chapter 36, "Managing Biographical Information," Managing Relationships Data, page 471.

6. (Optional) Review communications and verify when they were sent, to whom they were sent, and if they were joint.

   You can review all communications in the system or review a summary of communications assigned to the primary individual or the related ID, if it exists. The joint communication is listed in the summary for both IDs even though the joint communication can be assigned to only one ID.

   and Chapter 48, "Managing Communications," Reviewing Communications, page 833.

Prerequisites

Before assigning and managing communications, you must set up communications in the system.

Common Elements Used in This Chapter

(communications)	Click to transfer to where you can add a new communication for the individual or organization.
(checklists)	Click to transfer to where you can add a new checklist for the individual or organization.
(comments)	Click to transfer to where you can enter a new comment for the individual or organization.
View or Edit	Click to transfer to where you can view or edit the communication assignment. **Note.** The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Assigning Communications

This section discusses how to:

- Assign a communication.
- Review or update variable data.
- Add or delete enclosures.
- View the communication generated by the Communication Generation process.
- Identify recipients for an organization.

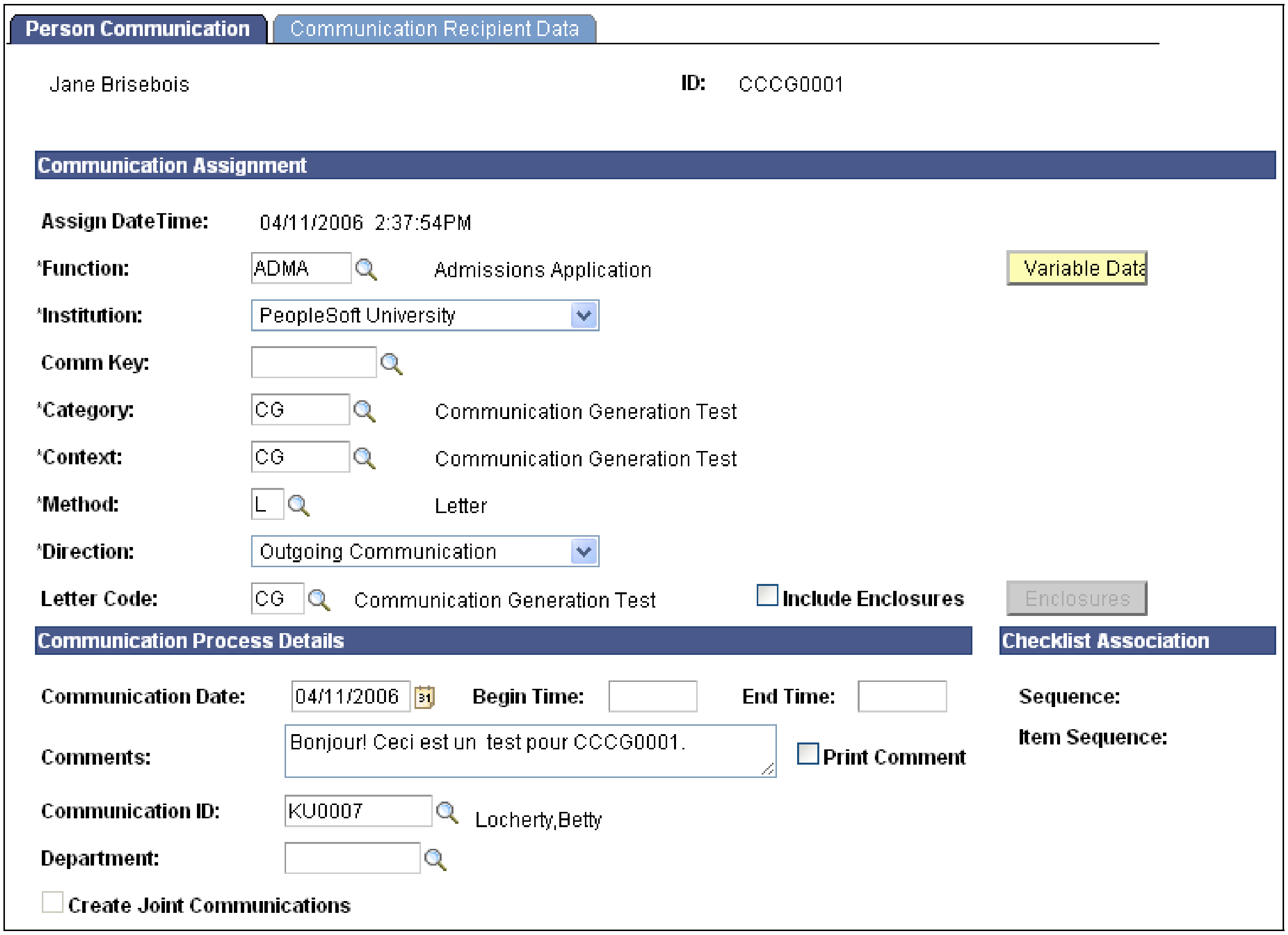
Pages Used to Assign Communications

Page Name	***Definition Name***	***Navigation***	***Usage***
Person Communication	COMM_MGMT1	• Campus Community, Communications, Person Communications, Communication Management • Contributor Relations, Constituent Information, People, Communications, Communication Management • Contributor Relations, Communications, Communications, Person, Communication Management	Assign communications to individuals.
Organization Communication	ORG_COMM_MGMT1	• Campus Community, Communications, Organization Communications, Communication Organization • Contributor Relations, Constituent Information, Organizations, Communications, Organization Communication • Contributor Relations, Communications, Communications - Organization, Organization Communication	Assign communications to organizations.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	• Click the Variable Data button on the Person Communication page. • Click the Variable Data button on the Organization Communication page.	Review or edit variable data for an individual or organization.

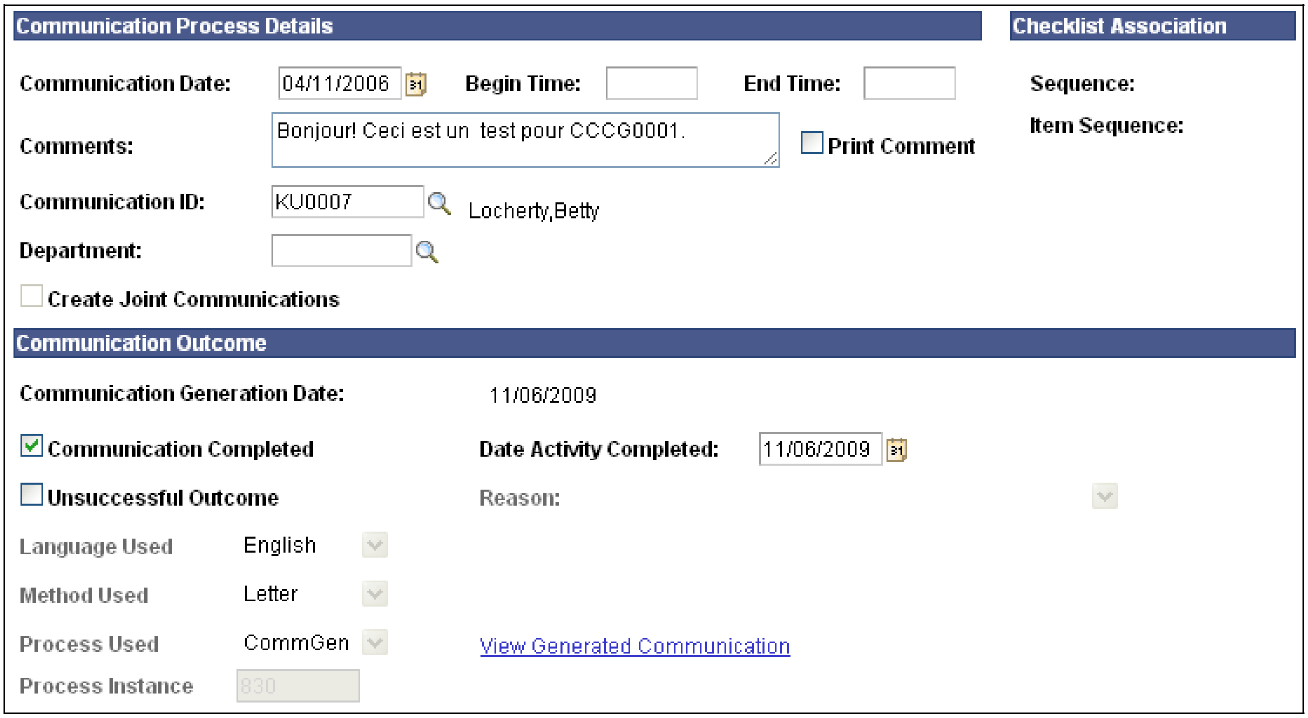
Page Name	*Definition Name*	*Navigation*	*Usage*
Communication Enclosure	ENCL_TBL_SEC	• Click the Enclosures button on the Person Communication page. • Click the Enclosures button on the Organization Communication page.	Review, add, or delete enclosures when assigning a communication.
View Communication	SCC_CG_ATTREL	Click the View Generated Communication link that appears on the Person Communication or Communication Recipient Data pages or on the Organization Comm Recipients page when a communication is generated by the Communication Generation process.	Launch a new window displaying the final outputs, including softcopy enclosures, generated by the Communication Generation process.
Organization Comm Recipients	ORG_COMM_MGMT2	• Campus Community, Communications, Organization Communications, Communication - Organization, Organization Comm Recipients • Contributor Relation, Constituent Information, Organizations, Communications, Organization Communication, Organization Comm Recipients • Contributor Relations, Communications, Communications - Organization, Organization Communication, Organization Comm Recipients	Identify the contacts, departments or locations at the organization who should receive the communication.

Assigning a Communication

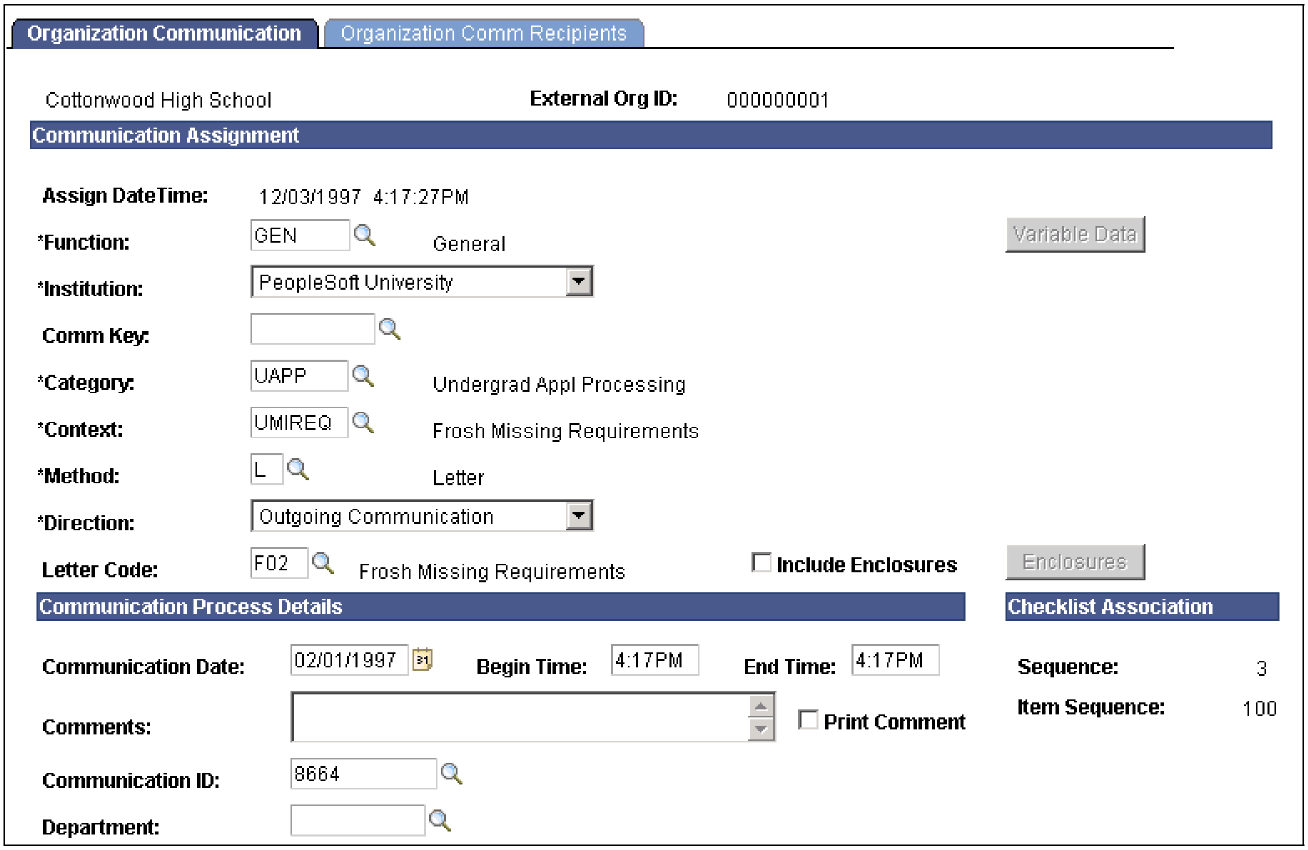
Access the Person Communication page (Campus Community, Communications, Person Communications, Communication Management) or the Organization Communication page (Campus Community, Communications, Organization Communications, Communication Organization).



Person Communication page (1 of 2)



Person Communication page (2 of 2)



Organization Communication page (1 of 2)

Organization Communication page (2 of 2)

Note. If you transferred to this page by clicking the Communication button on another page, the administrative function of the functional area of the first page, along with the academic institution and all the variable data associated with the administrative function, transfers here. If you did not transfer here from a functional area, you must enter the function, institution, and variable data.

Communication Assignment

Function

Enter the code for the functional area that includes this communication.

Available function codes are from the Administrative Functions page.

Variable Data

Click this button to access the Variable Data page, where you can view or enter the required variable data associated with the specified function.

Institution

Specify the institution responsible for this communication.

Comm Key (communication speed key)

Enter the name of the communication speed key that contains the communication category, communication context, method, direction, and letter code for this communication.

When you select a communication speed key that is valid in your user preferences, the system displays all the values for you. If you do not use a valid communication speed key, you must enter the category, context, method, direction, and letter code values manually.

Category

Enter the category code for this communication.

Available category codes are from the Communication Categories page.

Context

Enter the context code for this communication.

Available context codes are from the Communication Contexts page.

Method

Enter the method for this communication.

Only the methods associated with the specific context on the Communication Contexts page are available.

Note. The method selected on the Communication Generation process run control component overrides the method that you enter on the assignment component.

Direction

Select the direction for this communication.

Only the directions associated with the specific context on the Communication Contexts page are available from the prompt list.

Letter Code

The code, from the Standard Letter Table CS component, for this communication. The letter codes available are those associated with the context and function selected for this communication.

Include Enclosures

If the selected letter code represents a letter that is set up to include enclosures, the system automatically selects this check box for you. You can then click the Enclosures button to review, add, or delete the set enclosures.

If the letter is not set up to include enclosures, you can manually select this check box to include enclosures and click the Enclosures button to add the desired enclosures.

Enclosures This button is available when the Include Enclosures check box is selected. Click to access the Communication Enclosure page, where you can review, add, or delete enclosures.

Communication Process Details

Communication Date The default communication date is the system's current date. You can override this date.

Enter the date on which the communication should be processed. For example, you might assign a communication today, but want the communication to be processed two weeks from today. Override the default date and enter the date two weeks from now. The extract processes for both Letter Generation and Communication Generation look at this date to know when to generate the communication.

Begin Time and **End Time** Enter the times when the communication begins and ends. These times are helpful for telephone or in person communications.

Comments Enter comments to further identify or describe the communication for this individual.

If comments are associated with the communication speed key, the system automatically displays them here. You can change these comments or delete them.

Print Comment Select this check box to print comments on the communication.

Communication ID Enter the ID of the staff person who communicated with or is initiating this communication with the individual.

Department (Optional) Enter the department within your institution that is responsible for assigning this communication.

Available departments are from the Department Profile page.

Create Joint Communications This check box is available only if the individual to whom you are assigning the communication has a joint relationship on the Relationships component and if the letter code on the Standard Letters page is set to allow joint communications.

When available, select this check box to address the communication jointly to this individual and the related individual identified on the Relationships page.

Checklist Association

The system automatically populates the fields in this group box only when the communication is created as part of a checklist.

Sequence The checklist sequence, from the Checklists page.

Item Sequence

The checklist item sequence number, from the Checklists page, that created this communication.

Communication Outcome

When you run either the Letter Generation process or the Communication Generation process, the system automatically completes the fields in this group box to indicate the outcome of the communication, at which point the fields become uneditable.

If you do not use either of the processes and you want to track the communication outcome, you must manually enter the appropriate values in the fields.

Communication Generated Date

The system displays the date and time when the process generated the communication.

For the Letter Generation process this is the Update Communication Letter Printed Date With from the run control page.

For the Communication Generation process this is the Update Communication Generation Date With from the run control page.

Communication Completed

Select the check box to indicate that the communication was generated. For example, the communication is complete if the phone call was made or if the letter was generated.

The Letter Generation and Communication Generation processes automatically mark the communication complete so that the process will not select the ID again for the same communication.

On the run control pages for both processes, you can set the process to not mark the communication complete if the ID is missing critical data. Administrative users can add the missing critical data (for example, a missing address) and the process will select the ID again for processing.

If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.

Date Activity Completed

Enter the date when completing the communication. Letter Generation and Communication generation processes populates this date with the Update Communication Completed Date With date from their respective run control page. You can manually override this date.

Note. When you update the status of a communication that is related to a checklist item, the system displays a message reminding you to also update the status of the checklist item.

Unsuccessful Outcome

Select this check box to indicate that the communication was unsuccessful. For example, if no one answered the phone or the letter was returned as undeliverable.

If the Letter Generation or Communication Generation process was used, the process selects this check box to indicate that the process was unable to successfully extract data for this communication. The Communication Generation process also selects this check box if the ID was set to receive an email but no email address was found, and if no organization recipient was found when generating an organization communication.

If you are using a communication speed key, the system might select this check box for you, depending on information associated with that Comm Key.

Reason

Available when the Unsuccessful Outcome check box is selected.

Indicates the reason that the communication was unsuccessful. For example, if a letter that you sent was returned, you might select *Returned Mail* as the reason that the communication was unsuccessful.

The Letter Generation or the Communication Generation processes select *Missing Critical Data* to indicate that the absence of critical data prevented the extract process from completing for this communication.

Values for this field are delivered with the system as translate values. Do not modify the values of *Missing Critical Data, Invalid Email Address,* and *No Org Recipients Found.*

Language Used and **Method Used**

Displays the values used by the generating process.

The Letter Generation process uses the base language that was set for your institution at installation and the method of *Letter,* which is the only method that the process supports.

The Communication Generation process uses the language and method specified on the Communication Generation run control component.

Also, for communications with individuals, if your institution supports preferences and the Communication Generation process is set to use them, the preferences takes priority over your institution's base language and the method selected during communication assignment.

For example, assume that your institution's base language is English and the assigned method is*Letter,* but an ID's preferred language is French and her preferred method is email. The Communication Generation process is set to use the preferences and upon completion of the process, the outcome Language Used would be *French,* and the Method Used would be *Email.*

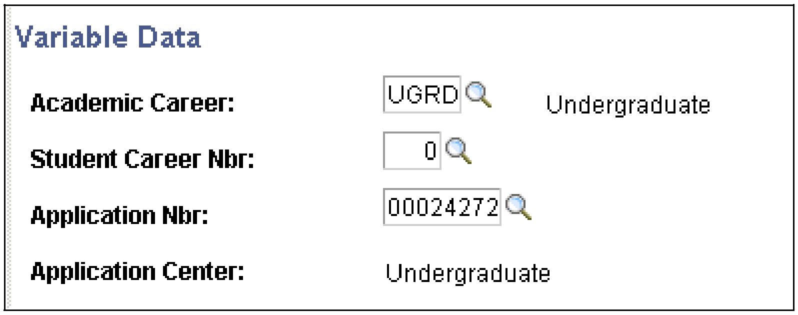
For communications with organizations, the Language Used is your institution's base language, and the Method Used is determined by your selection on the Communication Generation Run Control parameters page.

Note. Communication preferences are not supported for organization recipients.

Process Used	Displays the name of the process used to generate the communication: *Letter Gen, Comm Gen,* or *Manual* if you manually completed the communication.
Process Instance	Appears only when the communication for the ID is marked *Completed* by the Letter Generation, Communication Generation, or Envelope and Label Generation process. You cannot change the number. The process instance number is a reference to the communication data used by the process to generate and complete the communication. The process instance number from the Communication Generation process retrieves the data extracted for the letter to ensure data consistency when envelopes and labels are generated by the Envelope and Label process. The process uses the Communication Generation process instance number (on the Envelope and Label Generation Selection Parameters page) to capture the same data.
View Generated Communication	This link appears only when a communication is generated by the Communication Generation process and the Letter Printed Data field in the Standard Letter Table CS component for the letter code used, is set to *All* or *Name/Address Only.* If recipients are set for the ID on the Relationships component, this link appears on the Communication Recipient Data page for each recipient for whom the communication was generated. The process uses the language and method assigned to the main ID for the ID's recipients. For organization communications, the link appears on the Organization Comm Recipients page for each recipient for whom the communication was generated. Click to access the View Communication page where you can view the final outputs of the generated communications, including softcopy enclosures. This is useful for history purposes and for reprinting a letter or re-sending an email. **Note.** The View Generated Communication link appears only for the Communication Generation process. The Letter Generation process saves extracted data inside the Communication Letter Data page for each ID.

Reviewing or Updating Variable Data

Access the Variable Data page. (For individuals, click the Variable Data button on the Person Communication page. For organizations, click the Variable Data button on the Organization Communication page.)

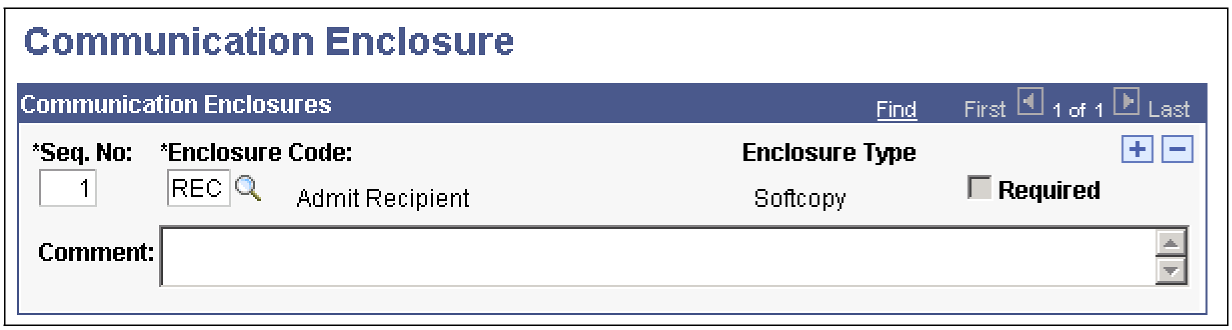


Variable Data page

Different fields and data appear on this page based on the administrative function selected on the Person Communication page.

Adding or Deleting Enclosures

Access the Communication Enclosure page. (For individuals, click the Enclosures button on the Person Communication page. For organizations, click the Enclosures button on the Organization Communication page.)



Communication Enclosure page

Note. When an enclosure is set as required for a letter on the Standard Letters page, information for that enclosure is visible but not available on the Communication Enclosure page. Thus, users are prevented from deleting an enclosure that your institution has decided is required.

Seq. No (sequence number)

The system automatically enters the next sequential number, up to 10, for each enclosure that you add. You can override the numbers manually to reorder the list of enclosures for this communication.

When you run the letter generation data extract process, the process lists, in the order identified here, up to 10 maximum enclosures on the main letter.

Enclosure Code

Enter the code for the letter that is to be included as an enclosure for this communication.

The letter codes available are those associated with the same function that you select for the main letter code. For example, if you select the function *ADMA* for the main letter code, the Enclosure Code field prompt list displays the letter codes that exist and are associated with the function ADMA on the Standard Letters page.

Enclosure Type

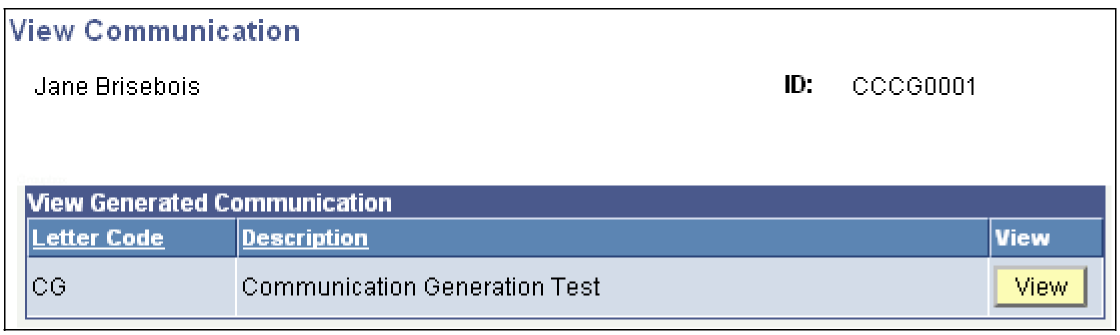
The system automatically displays the type of output *(Hardcopy* or *Softcopy)* associated with the selected enclosure letter code.

Required

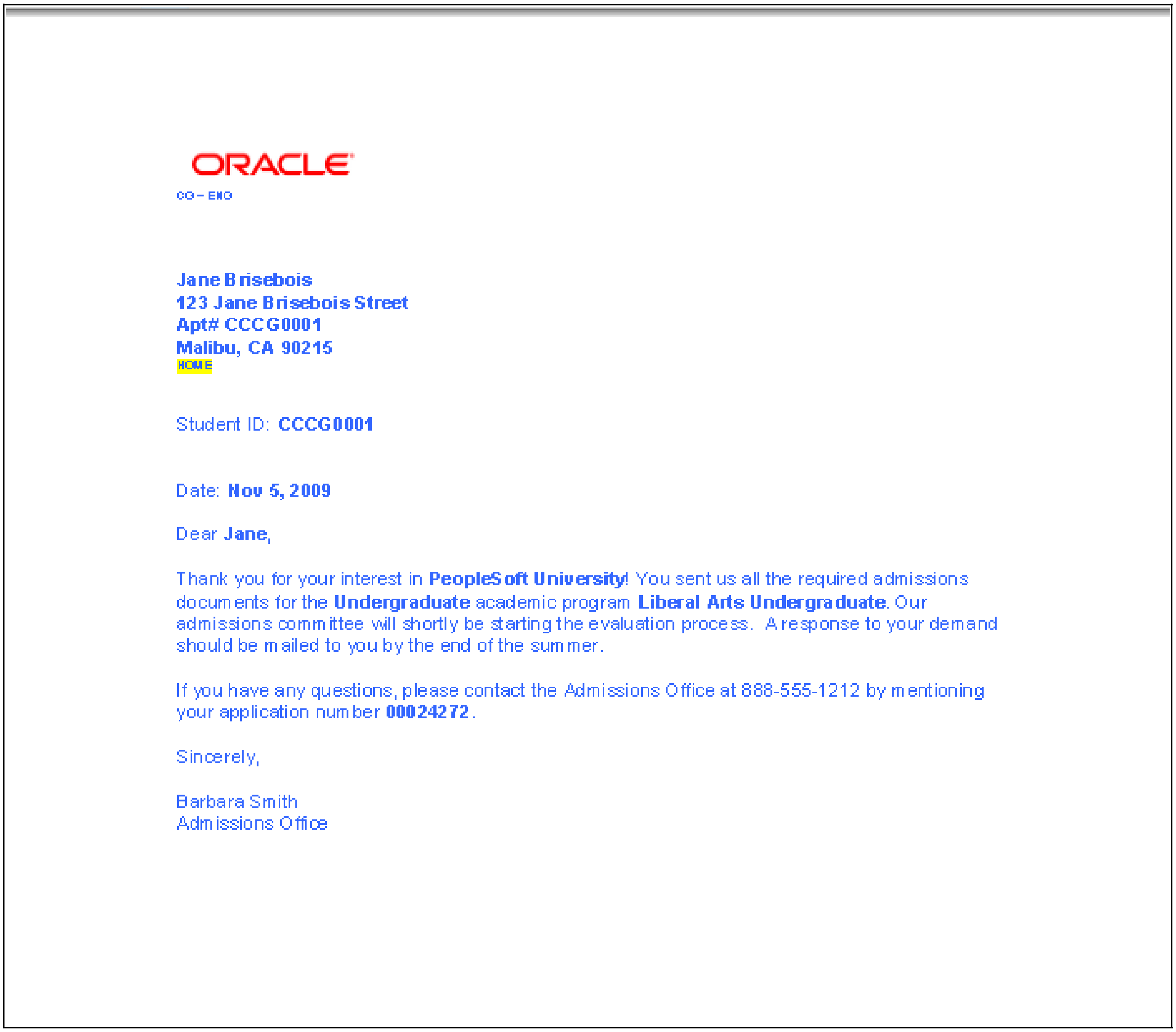
Select this check box to indicate that the specific enclosure must accompany this communication at all times.

Viewing the Communication Generated by the Communication Generation Process

Access the View Communication page (click the View Generated Communication link that appears on the Person Communication or Communication Recipient Data pages or on the Organization Comm Recipients page when a communication is generated by the Communication Generation process).



View Communication page



CG - ENG

Jane Brisebois
123 Jane Brisebois Street
Apt# CCCG0001
Malibu, CA 90215
HOME

Student ID: **CCCG0001**

Date: **Nov 5, 2009**

Dear **Jane**,

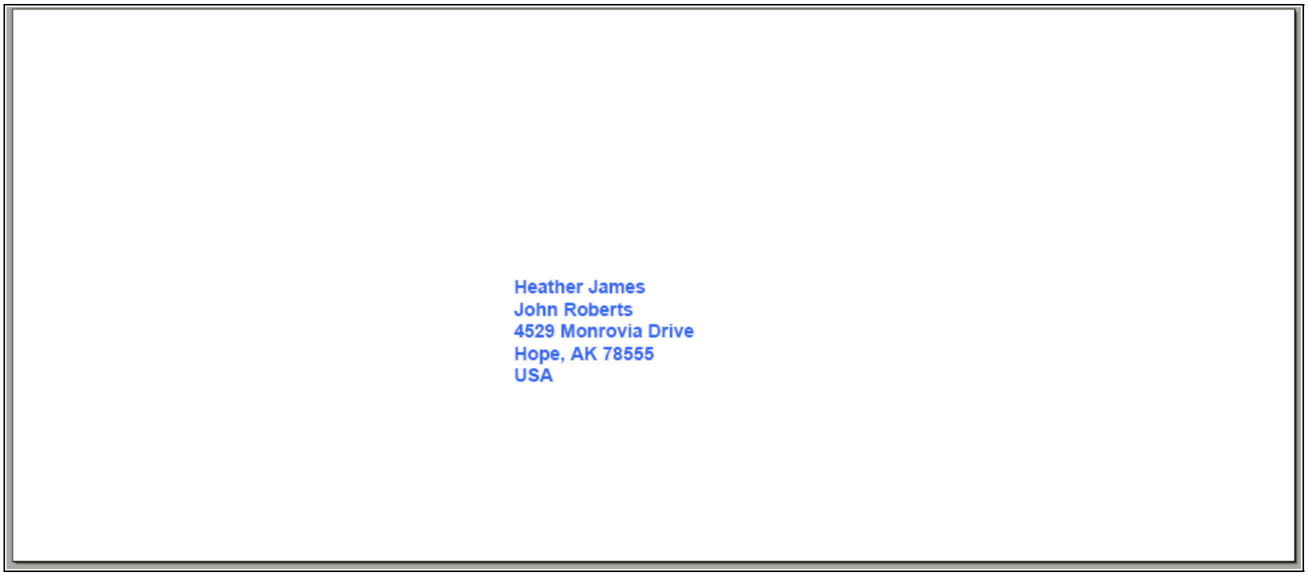
Thank you for your interest in **PeopleSoft University**! You sent us all the required admissions documents for the **Undergraduate** academic program **Liberal Arts Undergraduate**. Our admissions committee will shortly be starting the evaluation process. A response to your demand should be mailed to you by the end of the summer.

If you have any questions, please contact the Admissions Office at 888-555-1212 by mentioning your application number **00024272**.

Sincerely,

Barbara Smith
Admissions Office

Example view of a generated letter output



Example view of a generated envelope output

View

Click to open a new window displaying the .pdf or .rtf file containing the generated letter or email output.

Note. The first letter code in the View Generated Communication list is the main letter code of the generated communication. The other letter codes, if any, are the enclosures letter codes.

View Envelope

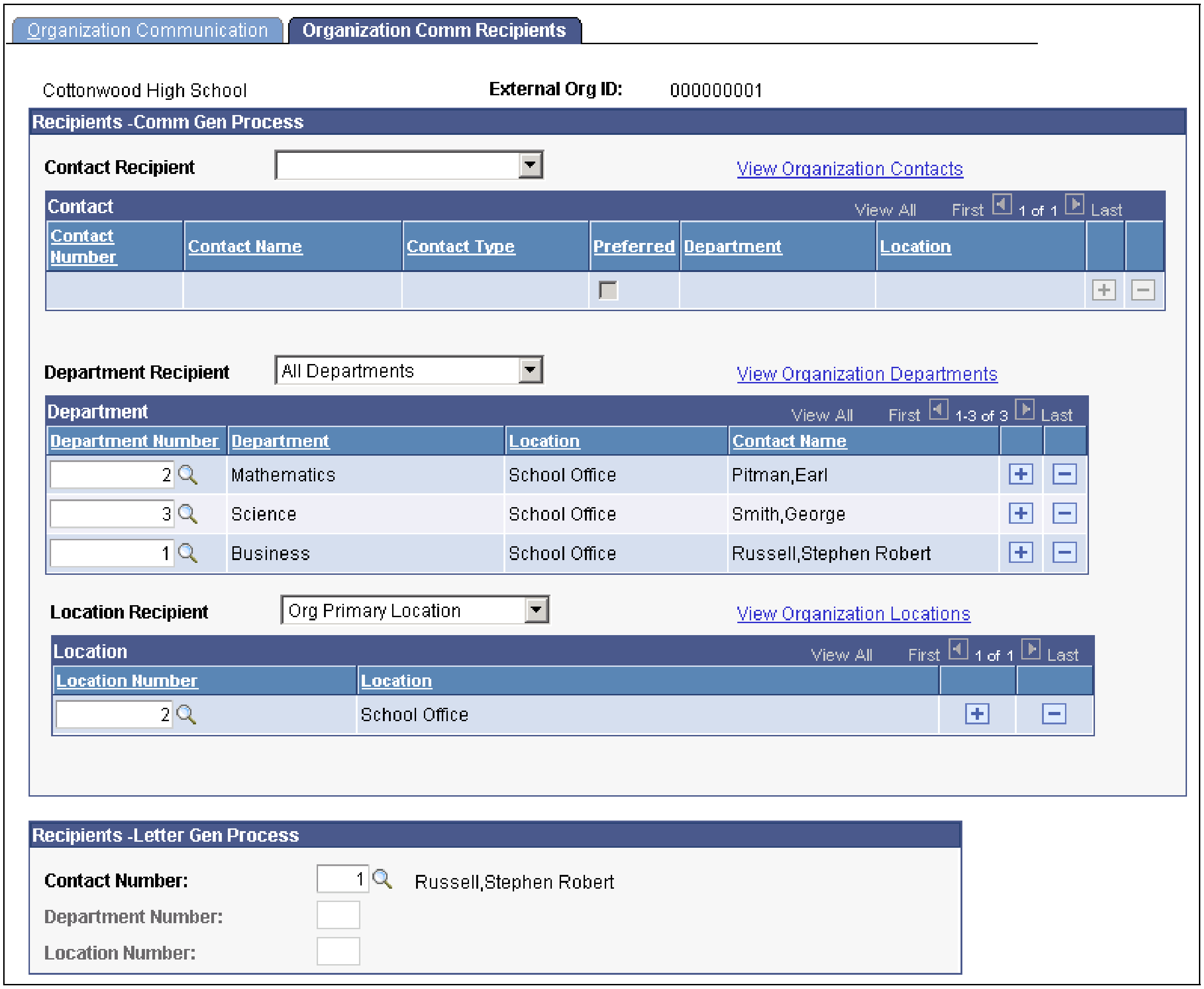
Appears only when the *Create Envelopes* output option is selected on the Process Parameters page in the Communication Generation component.

Click the link to open a new window displaying the .pdf file containing the generated output for the envelope. Viewing the envelope data can help you gather all information necessary to resend a communication.

Note. You can view only the generated envelope, not the label. However you can use the envelope data to recreate the label if necessary.

Identifying Recipients for an Organization

Access the Organization Comm Recipients page (Campus Community, Communications, Organization Communications, Communication - Organization, Organization Comm Recipients).



Organization Comm Recipients page

If the letter code used to assign the communication has Communication Generation parameters defined on the Standard Letters Table page, then both the Recipients - Comm Gen Process and Recipients - Letter Gen Process group boxes appear. If, when you assign the communication, you do not know which process will be used to generate the communication, you can either define recipients for both processes, or you can leave the fields blank in which case, the process evaluates default usages to select the recipients.

Recipients - Comm Gen Process

The Communication Generation process will extract data for multiple recipients including contacts, departments, locations or any combination of those.

The system displays values in the Contact,Department, and Recipient group boxes based on the *Contact Recipient*, *Department Recipient*, and Location Recipient values that you enter.

The fields are enterable only when *Custom List* is selected. If you do not know who should receive the communication for an organization, do not select any recipients. The Communication Generation process will evaluate the value entered in the Org Communication Usage group box in the run control component. If the process does not find recipients based on the usage, it selects the Unsuccessful Outcome check box and displays the reason *No Org Recip Found* (no organization recipient found).

After the Communication Generation process runs, each group box becomes unavailable and lists who in that group was set to receive the communication. The system displays a *View generated communication* link next to each recipient for whom the output was generated. Click to access the Communication View page where you can launch a window displaying the final output as it was addressed to that recipient.

If you select *All Departments,* the system displays all the departments for the organization in the Recipients - Comm Gen Process group box as of that date. For example, if you run the process 2 weeks later and 3 more departments were added, the process extracts data for all departments including those 3 and the group box lists 3 more department names than before.

Contact Recipient	Enter the type of contact that should receive this communication. The available values are: *(Blank), All Contacts, Custom List, Org Preferred Contact,* and *Org Primary Contact.* These are translate values and should not be modified.
View Organization Contacts	Click to access the Organization Contacts Summary page, where you can view all the contacts for this organization by contact type to determine which contacts should receive this communication.
Contact Number and **Preferred**	Enter the number of the specific recipient contact. The system displays the contact's name, type, location, and department. If the contact is set as the preferred contact on the Contact Summary page for the organization, the system selects the Preferred check box.
Department Recipient	Enter the departments whose contacts should receive this communication. The available values are: *(Blank), All Departments, Custom List,* and *Org Primary Department.* These are translate values and should not be modified.
View Organization Departments	Click to access the Organization Department Summary page, where you can view all the departments and their contacts for this organization to determine which contacts should receive this communication.
Department Number	Enter the number of the specific recipient department. The system displays the department and location names from the Organization Departments page
Location Recipient	Enter the location whose contacts should receive this communication. The available values are: *(Blank), All Locations, Custom List,* and *Org Primary Location.*These are translate values and should not be modified.
View Organization Locations	Click to access the Organization Location Summary page, where you can view locations for this organization to determine which contacts to select as recipients for this communication.
Location Number	Enter the number of the specific recipient location. The location information comes from the Location Summary page for the organization.

Recipients - Letter Gen Process

For the Letter Generation process, you can identify the recipient for the organization if you know it, or you can leave the fields blank, in which case the process evaluates default usages to select the recipient for you.

Contact Number	Enter the contact number of the person at the organization who should receive this communication. Available IDs are from the Organization Contacts page.
Department Number	Enter the number of the department at the organization whose contact should receive this communication. Available departments are from the Organization Departments page.
Location Number	Enter the number of the location to use for this organization. Available locations are from the Organization Locations page.

Using the Letter Generation Process

This section provides overviews of the Letter Generation (Letter Gen) process and the sample templates, lists prerequisites, and discusses how to:

- Specify general parameters.
- Specify date/merger parameters.
- Specify checklist parameters.
- Run the letter generation data extract process.

Understanding the Letter Generation Process

You can extract data from your PeopleSoft Campus Solutions system and use it to generate letters, labels, lists, envelopes, and so on. You can extract data from one individual ID, all individual IDs, or all organization IDs in your database. You specify the type of data to extract and then run the extract process. The system places the extracted data into a comma delimited (.csv) file, which is a standard format readable by most word processing programs. Then, using your institution's word processing software, you can merge the data into any of the templates that you have for the letter codes defined on the Standard Letters page, including the sample Microsoft Word templates delivered with the system, and print the outcome.

For information about using your institution's word processing software to merge data and print letters, consult the manufacturer's documentation.

Before you can extract letter data, a communication record for the desired letter must be assigned to the intended recipients. For joint communications, you should assign the communication to only one of the individuals. If you assign it to both, the letter generation process extracts the data for both IDs and will print two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context, and specify a method of *Letter* and the direction of *Outgoing.* You can assign communications to individuals or organizations manually or using the 3C engine or mass change functionality.

When the communication records exist, follow this procedure to use the Letter Generation process to extract data and generate a letter:

To generate a letter:

1. Specify the data to extract for the letter, including the ID, address usage, address name, salutation, and letter code.
2. Specify the date to print on the letter, the date to use as the letter completed date, and the communication date selection range.
3. Specify any checklist items to include in the letter.
4. Run the Letters Data Extract process to extract the specified data.
5. Use your word processing program to merge the extracted data into the letter template.
6. Save the softcopy template with merged data or use it to print the letter.

Specifying the parameters for extracting data for the letter includes selecting the letter to use, identifying the individuals or organizations whose data you want to extract, and specifying the types of data to extract. Use the run control pages, described in the following sections, to specify extract data parameters.

After defining all of the parameters for extracting data, run the data extract process. Unless you specify a different file path, the process places the data files in the temporary directory for the server. You can specify a shared folder on your local machine or on any valid network drive path.

When the process finishes, files with the appropriate file names are placed at the specified extract file path destination. If you select the .csv output, three files are created at the destination:

- CCLTR<LETTERCODE>.CSV for letters.
- CCLBL<LETTERCODE>.CSV for labels.
- CCLTRGEN.DAT file, which is coded to work with the Microsoft Word templates delivered with the system.

For example, if you use the TRN letter code and you select the .csv output, the file for letters at the destination is CCLTRTRN.CSV.

Note. If you use a letter code for which you specified a unique SQC, you must place the SQC in the same directory as the CCLTRGEN.sqr and the CCLTRUNQ.sqc. You must also modify CCLTRNAM.SQC to look for the specific SQC.

You can review extracted data online for individuals and organizations on the Communication Letter Data pages.

When you run the letter generation data extract process, the data specified under Letter Printed Data for that letter code on the Standard Letter Table page is listed on the Communication Letter Data page for individuals or on the Organization Communication Letter Data page for organizations. You can use these pages to review and confirm the data extracted for an individual or organization. For example, using the Communication Letter Data page, you can confirm the address to which the letter for a specific individual was addressed.

The letter generation data extract process automatically formats extracted addresses to meet U.S. postal regulations for domestic and international mail. The format is reflected in the address listed on the appropriate Letter Data page.

If you set a relationship to generate a copy of communications for a separate recipient on the Communication Recipient page in the Relationships component, you can view the data extracted for that separate recipient on the Communication Recipient Data page described in this section.

Understanding the Letter Generation Sample Templates

The letter generation data extract process creates a .dat file for merging data from your system into Microsoft Word templates. The PeopleSoft Campus Solutions system delivers sample Microsoft Word templates. You can use the sample templates as delivered, modify them (unless otherwise indicated in the warning below), or create your own Microsoft Word templates.

This table lists the CS letter codes with corresponding delivered sample templates.

Letter Code	***Description***	***Microsoft Word Template Name***
APP	Appointment Mailer	CCLTRAPP.DOC
AV1	Gift Acknowledgement	CCLTRAV1.DOC
AV2	Gift Receipt	CCLTRAV2.DOC
CST*	Inquiry Acknowledge – Viewbook	CCLTRCST.DOC
F02	Frosh Missing Requirements	CCLTRF02.DOC
F03	Frosh Admit Regular	CCLTRF03.DOC
FAN*	Financial Aid Notification	FANLTR.DOC
IHC	International Health Coverage	CCLTRIHC.DOC
IN1	Initiative Appeal	CCLTRIN1.DOC
JNT	Summer party - Joint Invitation	CCLTRJNT.DOC
MAD	Mid-Term Academic Deficiency	CCLTRMAD.DOC
MB1	Membership Card	CCLTRMB1.DOC
OFR	Early Offer Letter	CCLTROFR.DOC

Letter Code	*Description*	*Microsoft Word Template Name*
OPR	Web Operator Notification	CCLTROPR.DOC
P01	Inquiry Acknowledgment	CCLTRP01.DOC
REC	Admit Recipient Letter	CCLTRREC.DOC

Warning! Do not modify the PeopleSoft Financial Aid FAN letter code or template. Modifications to this value could cause processes that depend on it to fail, requiring substantial reprogramming effort.

For sample templates delivered for PeopleSoft HRMS, refer to the PeopleSoft HRMS 9.0 Application Fundamentals PeopleBook, "Setting Up and Generating Form Letters."

Prerequisites

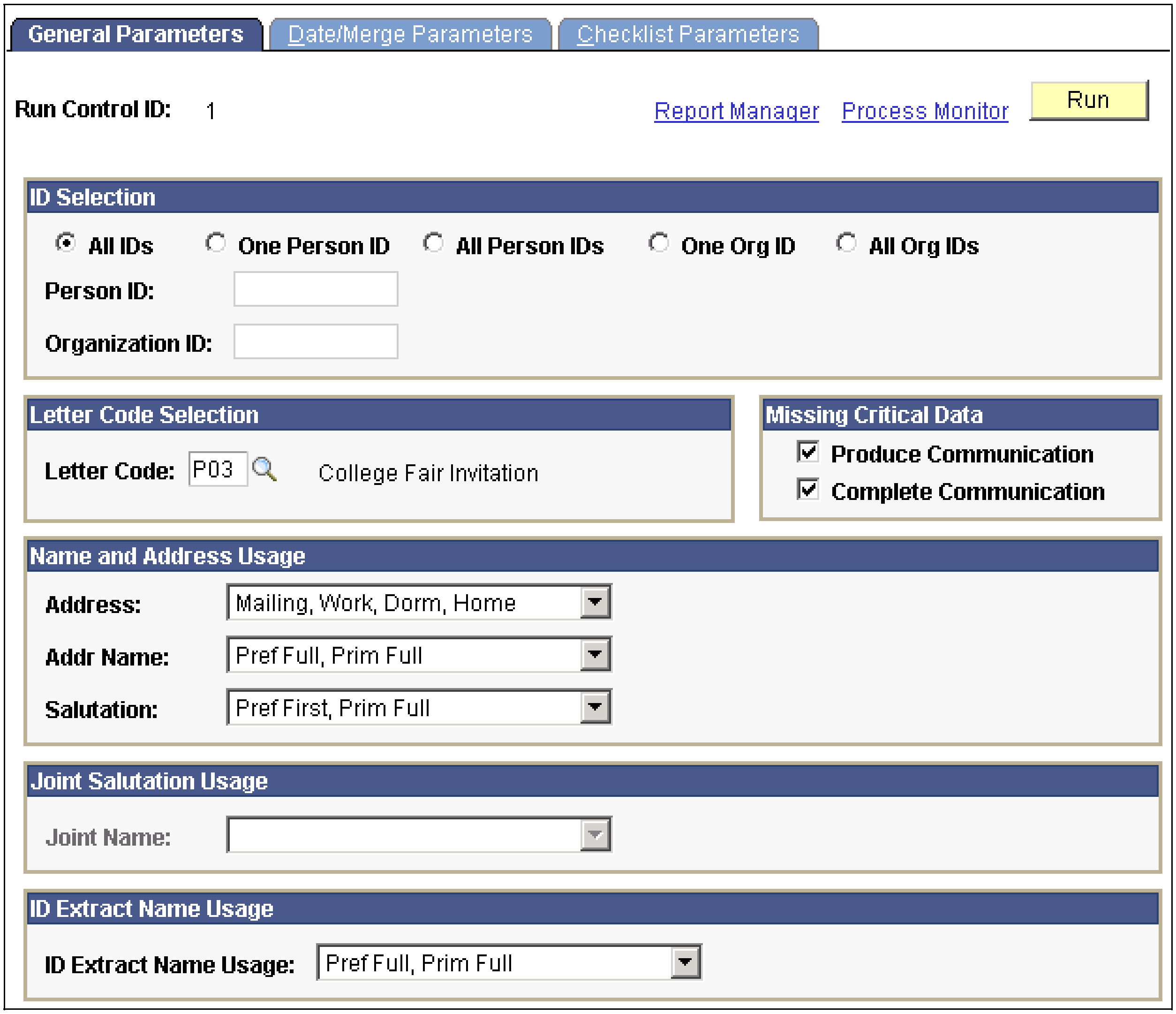
Before identifying data to extract and merge into letters or other communications output, design your Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups.

Pages Used for the Letter Generation Process

Page Name	*Definition Name*	*Navigation*	*Usage*
General Parameters	RUNCTL_LTRGEN1	Campus Community, Communications, Letter Generation, General Parameters	Specify general parameters for extracting letter data, including the IDs for which data is to be extracted, the letter code into which the data should be merged, the name and address usages to use, and the joint salutation (if appropriate).
Date/Merge Parameters	RUNCTL_LTRGEN2	Campus Community, Communications, Letter Generation, Date/Merge Parameters	Specify the necessary file locations, dates, and sort option for extracting data.
Checklist Parameters	RUNCTL_LTRGEN3	Campus Community, Communications, Letter Generation, Checklist Parameters	Specify any checklist items to extract and use in a letter.

Specifying General Parameters

Access the General Parameters page (Campus Community, Communications, Letter Generation, Checklist Parameters).



General Parameters page

ID Selection

All IDs

Select to extract the data from all IDs (person IDs and organization IDs) that are assigned a communication with the letter code indicated and that are not marked complete.

One ID	Select to extract the data from the one individual ID indicated. The communication with the indicated letter code must be assigned to this individual. If you select the One ID option, specify the individual's ID in the Person ID field.
All Person IDs	Select to extract the data from all the individuals' IDs that are assigned a communication with the letter code indicated.
One Org ID (one organization ID)	Select to extract the data from the one organization ID indicated. The communication with the indicated letter code must be assigned to this organization. If you select the One Org ID option, specify the organization's ID in the Organization ID field.
All Org IDs (all organization IDs)	Select to extract the data from all the organization IDs that are assigned a communication with the letter code indicated and that are not marked complete.

Letter Code Selection

Letter Code	Enter the letter code that identifies the template into which to merge the extracted data. Only those letter codes to which you have 3C group security access are available from the list.

Missing Critical Data

Produce Communication	Select this check box for the process to produce the extract file even if critical data is missing (for example, address information or name of the recipient).
Complete Communication	Select this check box for the process to set the status to *Complete* even if critical data is missing.

Name and Address Usage

Name and address usages apply to letters addressed to individuals. They do not apply to letters for organizations.

Address	Enter the type of address, from the Address Usage page, to extract for this letter. You can list address types in a preferred search-and-use order. For example, if you list an address usage that contains*Mailing, Billing,* and *Home* the system searches for the mailing address first; if none exists, then the billing address; if none exists, the home address last.
Addr Name (address name)	Enter the type of name, from the Name Usage page, to extract for the address section of this letter. As with addresses, you can list address name types in a preferred search-and-use order.
Salutation	Enter the type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this letter. For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave). As with addresses, you can list salutation name types in a preferred search-and-use order.

Joint Salutation Usage

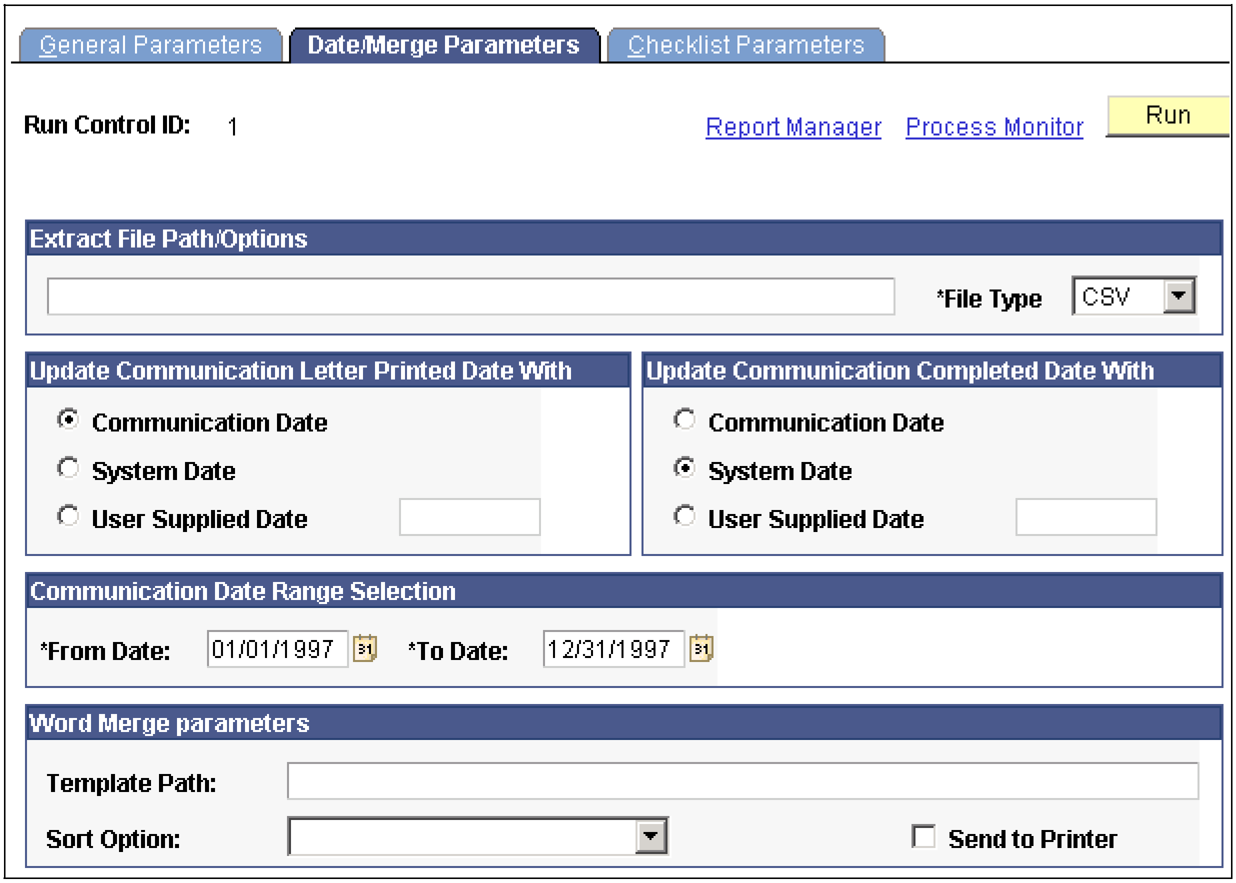
Joint Name	The Joint Name field is available when the selected letter code is set on the Standard Letters page to allow joint communications. The joint names available in the list are those with the Joint Usage check box selected on the Name Usage page. The process extracts this salutation name usage for IDs set up for joint communications.

ID Extract Name Usage

ID Extract Name Usage	Enter the ID name usage to use. The ID Extract Name Usage is an additional way to extract name data using the name usage. For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say *We are sure the Dominguez family will enjoy participating in this event.* As with addresses, you can list ID name types in a preferred search-and-use order.

Specifying Date/Merge Parameters

Access the Date/Merge Parameters page (Campus Community, Communications, Letter Generation, Date/Merge Parameters).



Date/Merge Parameters page

Extract File Path/Options

The server temporary directory is the default location for the .cvs and .dat extract files. If you want the system to place the files elsewhere, specify the correct path here.

The path must be a valid network path, containing the path delimiter (forward slash or back slash), and be in the appropriate letter case (upper or lower) for your platform. For example, on Windows NT where the target machine is Machine01 and the target folder is LtrData, the valid path is \\Machine01\temp\LtrData\.

File Type

Select the file type *(CSV* or *Other)* to create an extract file compatible with your word processing program. Comma delimited (.csv) files are compatible with most word processing programs.

The process also creates a .dat file specifically for Microsoft Word and the Word templates delivered with the system.

Update Communication Letter Printed Date With

Select the date to appear on the letter.

Communication Date Select to use the communication assignment date from the Person Communication page for individuals or the Organization Communication page for organizations as the date on the letter.

System Date Select to extract the current system date for the date of the letter.

User Supplied Date Select to use the specified date as the date of the letter. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record.

Communication Date Select to use the date when the communication was assigned as the communication completed date.

System Date Select to use the current system date as the communication completed date.

User Supplied Date Select to use the specified date as the communication completed date. You must supply the desired date.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from those IDs to which you assigned a specific letter code and set the communication date between January 1 and March 1 of the current year.

Use the date range to schedule and manage letter communications. For example, you might schedule daily or weekly runs of the letter generation data extract process for prospect inquiry letters, or missing information letters for applicants.

The from and to date range is inclusive of the dates that you enter.

Word Merge Parameters

If you are using the sample Word templates delivered with the system or if you are using other templates created in Microsoft Word, specify parameters here. A macro (CCLTRGEN.DOT) built into the delivered Word template process uses these parameters when performing a letter merge.

If you are not using Microsoft Word, you can skip these fields.

Note. Setting these parameters on the Letter Generation run control page affects the data included in the CCLTRGEN.DAT file, but does not invoke the Word merge process. To perform a letter merge, you must launch Word and perform the merge process.

Template Path Enter the file path to the template into which the process should merge the data.

Sort Option

Enter the order in which the process should sort the merged letters.

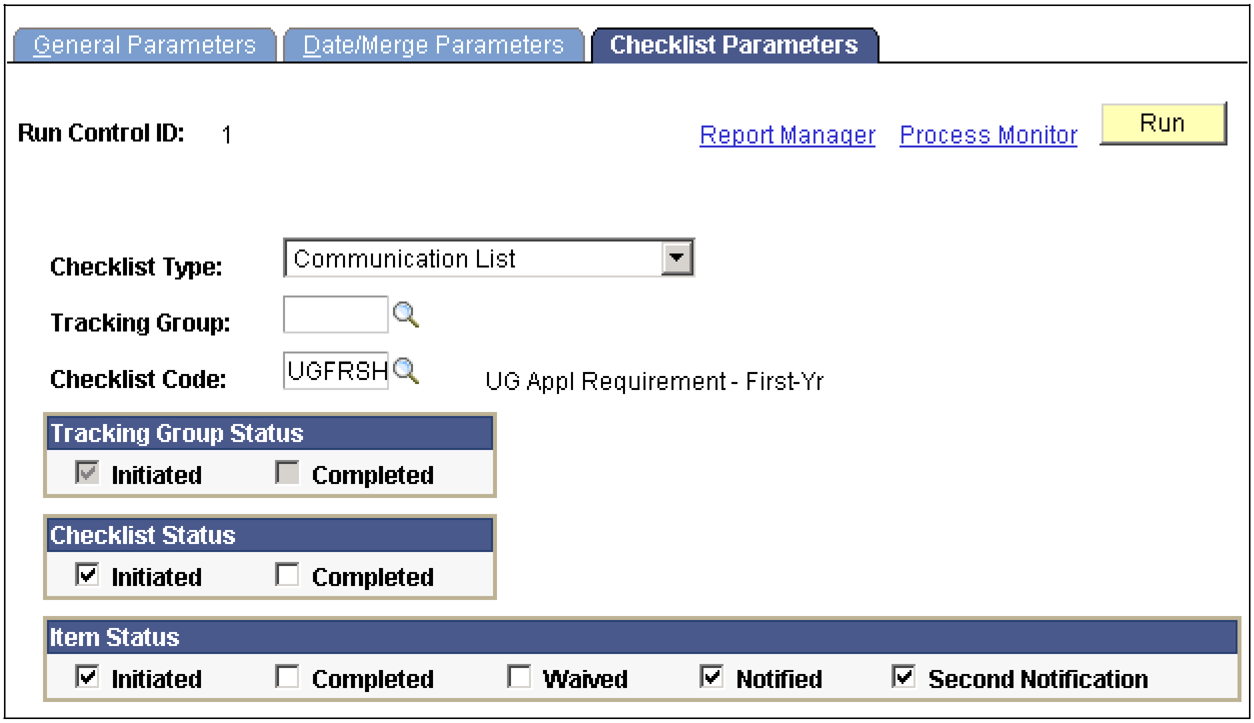
Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Send to Printer

Select for the Word letter merge process to automatically send the letter with merged data to the printer.

Specifying Checklist Parameters

Access the Checklist Parameters page (Campus Community, Communications, Letter Generation, Checklist Parameters).



Checklist Parameters page

Checklist Type

Enter the type of checklist from which the process should extract data for this letter.

Tracking Group

Enter the tracking group whose checklist data the process should extract for this letter.

Checklist Code

Enter the specific checklist code whose checklist item data the process should extract for this letter.

Tracking Group Status

If you specified a tracking group, you must also select a tracking group status. You can select more than one status option.

Initiated	Select to extract tracking group data with the status of *Initiated* for this letter.
Completed	Select to extract tracking group data with the status of *Completed* for this letter.

Checklist Status

Initiated	Select to extract data from checklists with the status of *Initiated* for this letter.
Completed	Select to extract data from checklists with the status of *Completed* for this letter.

Item Status

If you specified a checklist code, you must select a checklist item status. You can select more than one status option.

Initiated	Select to extract data from checklist items with the status of *Initiated* for this letter.
Completed	Select to extract data from checklist items with the status of *Completed* for this letter.
Waived	Select to extract data from checklist items with the status of *Waived* for this letter.
Notified	Select to extract data from checklist items with the status of *Notified* for this letter.
Second Notification	Select to extract data from checklist items with the status of *Second Notification* for this letter.

Running the Letter Generation Data Extract Process

After you specify the extract parameters, you can run the CCLTRGEN data extract process by clicking the Run button from the General Parameters page, the Date/Merge Parameters page, or the Checklist Parameters page.

Note. Setting parameters on these run control pages affects the data included in the CCLTRGEN.DAT file; however, it does not invoke the merge process. To perform a merge, you must launch the merge process provided from within your institution's word processing software. If you want to merge the extract data into any of the sample templates (or other Word templates), you must launch Word and perform Word's Mail Merge process.

Note. The default output for CCLTRGEN is .csv. This setting is defined within the CCLTRGEN program. Selecting Type and Format field values on the Process Scheduler Request page does not change this output.

Using the Communication Generation Process

This section provides overviews of the Communication Generation (Comm Gen) process and the sample templates, lists prerequisites, and discusses how to:

- Enter selection parameters.
- Enter process parameters.
- Enter email parameters.
- Enter checklist parameters.

Understanding the Communication Generation Process

The Communication Generation process (SCC_COMMGEN) is an application engine process that enables you to select specific fields from which to extract critical data for a letter code assigned to individual and organization IDs for whom you want to generate the communication. If your institution sets up and supports multiple languages and multiple methods for communications, you can generate communications for individuals in the language and method preferred by each recipient ID.

For communicating with organizations, the Communication Generation process enables you to select multiple contacts of multiple types as recipients of the communication for an organization. You can use contact names or organization departments and locations or any combination thereof.

Note. The preferred communication language and method features apply only to person communications. You cannot set preferences for recipients of organization communications.

The Communication Generation process supports enclosures, joint communications, communication recipients, checklist extract and status update, usages (names, address and salutation), print communication comment, and so on. Oracle BI Publisher is a PeopleTools feature that enables you to manage and merge communication templates and data source files for the Communication Generation process to generate letters or emails. The process uses standard letter codes from the Standard Letter Table page in PeopleSoft Campus Community.

Note. Both the Letter Generation and the Communication Generation processes use the letter codes set in the Standard Letter Table CS component. The only difference is that you must set up some additional aspects of a letter code specifically for the Communication Generation process. The Letter Generation uses the same letter codes, but ignores the Communication Generation-specific settings.

To use the Communication Generation process, you must first assign a communication record for the desired letter code to the intended recipients. For joint communications, you should assign the communication to only one of the individuals. If you assign it to both, the Communication Generation process extracts the data for both IDs and generates two joint communications for the same two people. The record must include the appropriate administrative function, communication category, and communication context and the direction of *Outgoing.*

You can assign communications to individuals or organizations manually, or you can use the 3C engine to assign them using the Population Selection process, the Trigger Event process, or the Mass Change process.

Understanding the Communication Generation Sample Templates

The Communication Generation extract process uses an Oracle BI Publisher data source for merging data from your system into templates. The PeopleSoft system provides samples of Oracle BI Publisher templates for the Communication Generation process. Templates are objects stored in the PeopleSoft database that are associated with report definitions starting with *QA_CS* and have a data source type of *XMLDoc Object.* You can use the sample templates as delivered, modify them unless otherwise indicated, or create your own templates. The sample report definition and template names begin with *QA_CS,* but you can rename them.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

This table lists the letter codes and corresponding report definitions.

Letter Code	***Description***	***Report Definitions***
CG	Communication Generation Test	QA_CSCGREPO QA_CSXTRADMA
CG1	Comm Generation Org Test 1	QA_CSCG1REPO QA_CSXTRAVIN
CG2	Comm Generation Org Test 2	QA_CSCG2REPO QA_CSXTRAVIN
CGO	Comm Generation Org Test	QA_CSCGOREPO QA_CSXTRAVIN
F01	Frosh Application Acknlgment	QA_CSF01REPO QA_CSXTRADMA
F02	Frosh Missing Requirements	QA_CSF02REPO QA_CSXTRADMA

Letter Code	Description	Report Definitions
REC	Admit Recipient	QA_CSRECREPO QA_CSXTRADMA
RM1*	Reminder Letter - 1st Request	QA_CS_SF_RMD
RM2*	Reminder Letter - 2nd Request	QA_CS_SF_RMD
RM3*	Reminder Letter - 3rd Request	QA_CS_SF_RMD
XT1	Extract Enclosure 1	QA_CSXTRGEN
XTR	Extract Data testing - CommGen	QA_CSXTRGEN

*Before modifying these letter codes, consult your student financials department or system administrator. Modifications to these could cause failure of processes that depend on them.

Prerequisites for the Communication Generation Process

Before identifying data to extract into a template, design your Campus Community structure, including names and address usages. Before specifying checklist items data to extract, set up checklists and tracking groups. Before running the Communication Generation process to generate and print letters, configure your printer for printing PDF format, and before running the process to generate and send emails, set your Process Scheduler SMTP settings.

See Also

PeopleTools: PeopleSoft Process Scheduler, "Managing PeopleSoft Process Scheduler," Using PSADMIN with PeopleSoft Process Scheduler.

PeopleTools: Oracle BI Publisher for PeopleSoft.

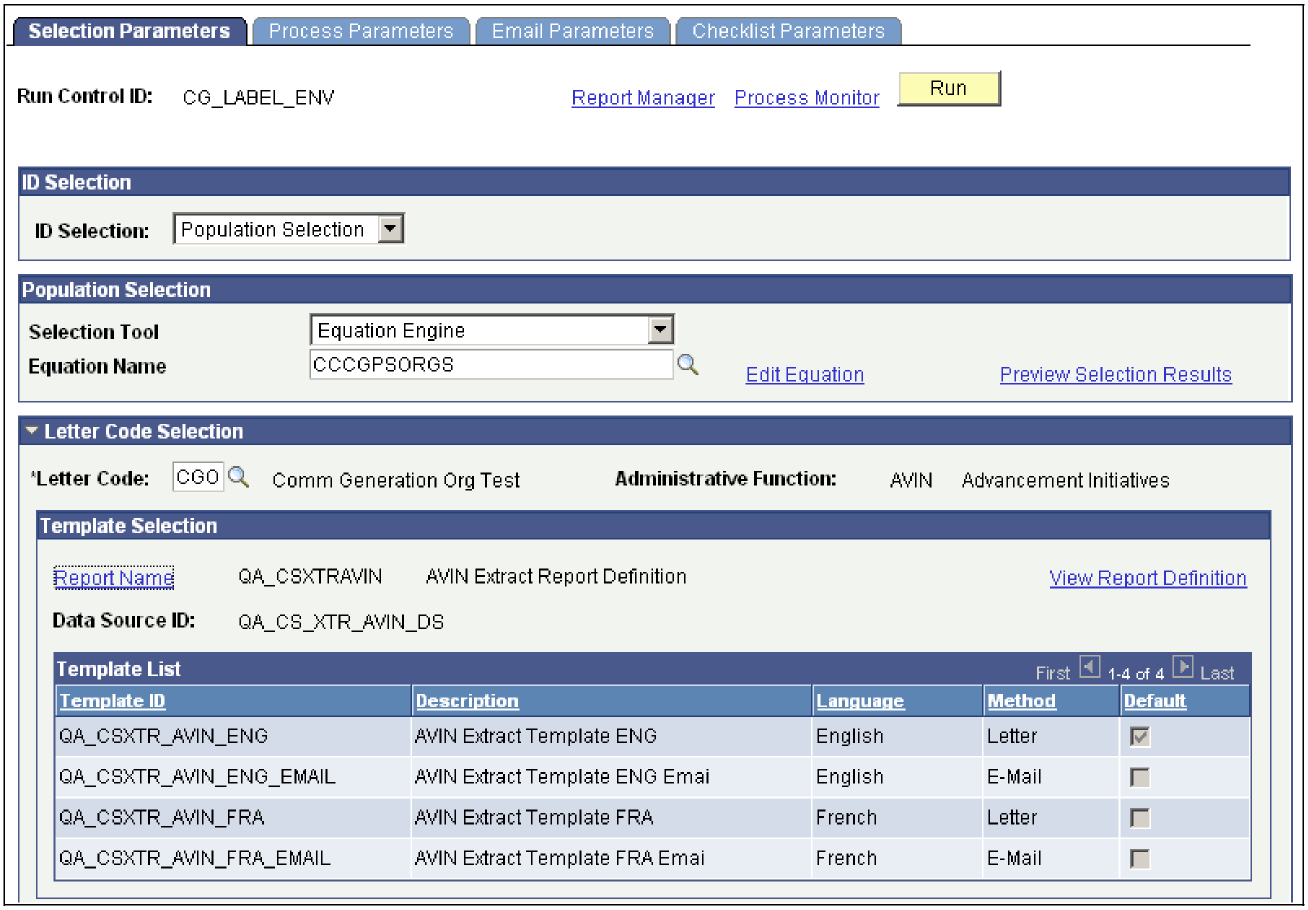
Pages Used for the Communication Generation Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Selection Parameters	SCC_CG_RUNCTL1	• Campus Community, Communications, Communication Generation, Selection Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Selection Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Selection Parameters	Specify general parameters for extracting letter data, including the recipient IDs for which data is to be extracted, the letter code, and report name. Also define the language and the method for the Communication Generation process to use to generate a specific letter or email.
Process Parameters	SCC_CG_RUNCTL2	• Campus Community, Communications, Communication Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Process Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Process Parameters	Specify usages and dates for the Communication Generation process to use, identify how the process is to handle missing critical data, and specify where the process is to place and sort the output when generating a specific letter or email.

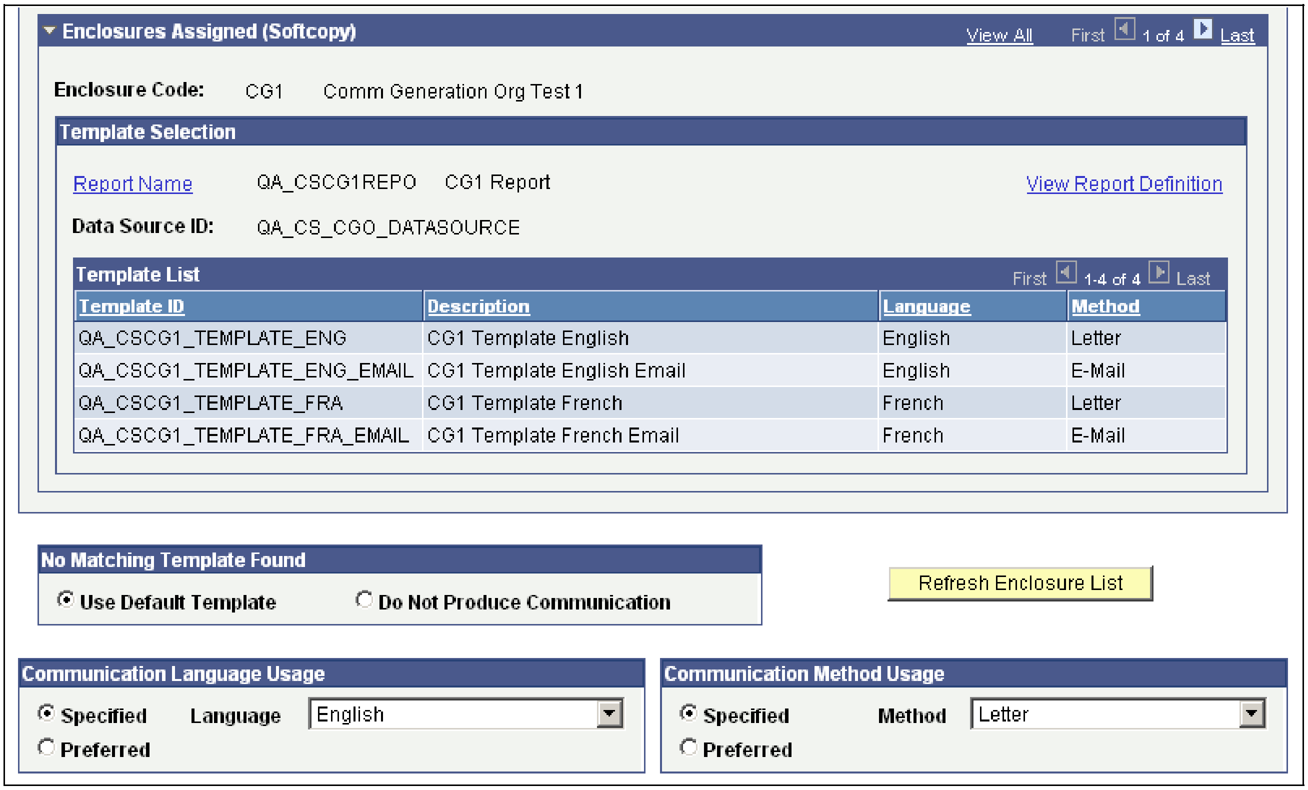
Page Name	***Definition Name***	***Navigation***	***Usage***
Email Parameters	SCC_CG_RUNCTL_EMAL	• Campus Community, Communications, Communication Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Process Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Process Parameters	Enter email data for the Communication Generation process to use when generating an email.
Checklist Parameters	SCC_COMM_CHKLST	• Campus Community, Communications, Communication Generation, Email Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Communication Generation, Email Parameters • Contributor Relations, Communications, Process Communications, Communication Generation, Email Parameters	Specify any checklist items to extract and use in a letter or an email.

Entering Selection Parameters

Access the Selection Parameters page (Campus Community, Communications, Communication Generation, Selection Parameters).



Selection Parameters page (1 of 2)



Selection Parameters page (2 of 2)

ID Selection

ID Selection

Select the type of IDs to process: *All IDs, All Person IDs, One Person ID, All Org IDs, One Org ID* or *Population Selection.* These are translate values and should not be modified.

Note. When the Population Selection value is selected, the IDs selected will be processed only if they have a communication assigned to them using the specified letter code, are within the communication date range, and are not yet completed. To assure that selected IDs have the desired letter code assigned, consider using the same population selection tool (same PS Query name, Equation Engine equation, or external file) inside the 3C Engine process to assign the desired letter code communication to the IDs.

Person ID

Available only when the ID Selection is *One Person ID.* You must enter the specific person ID to process here.

Organization ID

Available only when the ID Selection is *One Org ID.* You must enter the specific organization ID to process here.

Population Selection

This group box appears only when the ID Selection of *Population Selection* is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes

If your institution uses a specific selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a Communication Generation transaction, you must use it.

The PeopleSoft system delivers predefined sample queries to enable you to select person IDs, organization IDs, or both. The predefined queries are:

- QA_CS_CC_PS_COMMGEN - Population Selection and CommGen for PER.
- QA_CS_CC_PS_COMGEN_ORG - Population Selection and CommGen for ORG.
- QA_CS_CC_PS_COMMGEN_BOTH - Population Selection and CommGen for P+O.

The PeopleSoft system also delivers predefined sample equations to enable you to select person IDs, organization IDs, or both. The predefined equations are:

- CCCBPSPERS - Person only.
- CCCBPSORGS - Organizations only.
- CCCGPSBOTH - Person and organizations.

Letter Code Selection

Letter Code

Enter the letter code to use.

Only letter codes set up for the Communication Generation process and that are currently assigned to the specified IDs are available. For example, if you select *All Person IDs* and the FAN letter code is not assigned to any ID, the FAN letter code is not available.

Note. If you select the ID Selection of Population Selection or All IDs, all letter codes enabled for the Communication Generation process are available. This is because the IDs to select are still unknown at this point

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Administrative Function

Displays the administrative function associated with the letter code.

Report Name,Data Source ID, and **Template List**	Only the reports to which the report definition gives you security access, are available. If the letter code is associated with only one report, the system displays the report name, the data source file, and a list of the templates associated with that report. If the letter code is associated with more than one report, click Report Name to select the additional reports to use. When you select a report, the system displays the list of templates associated with that report along with the language and method for which the template is created. The Template List group box shows which template the system will use as a default template if there is no specified template. **Note.** An error message appears if two or more template IDs have the same combination of language and method inside one report definition. The combination of method and language must be unique for the Communication Generation process to know which template to use for each ID generated. See *PeopleTools: Oracle BI Publisher for PeopleSoft.*
View Report Definition	Click to open a new browser window displaying the Report Definition search page. In the new browser window, enter the report name or other information about the definition that you want to view and click Search to access the Report Definition component for the report. View the definition to confirm that it is the definition that you want to make available and to preview the templates. You can make changes to the report definition if you have security access to the page.

Enclosures Assigned (Softcopy)

Enclosure Code,Data Source ID, and **Template List**	If the letter code includes softcopy enclosures for the IDs, the system displays each enclosure code and its relevant information. Enter the report name to use for each enclosure. If no softcopy enclosures are included, the system collapses the group box. **Note.** If you select the ID Selection of *Population Selection,* you must select a report definition for all the enclosure codes that were included in the Person/Org Communication Management component when the letter code was assigned. This is because the IDs to select are still unknown at this point.

Refresh Enclosure List	Click to cause the Enclosures Assigned (Softcopy) section to include all available softcopy enclosures including enclosures that were added to the system since the last refresh of the process run control ID. Refresh the list of enclosures periodically to make sure you are processing the communications appropriately in scheduled runs of the process. Failure to refresh the list could result in producing missing enclosures for some IDs. For example, assume that you schedule a run control ID of *AAA* to run every night to generate a communication for all IDs that have the letter code *ABC* assigned. The next day, an administrator assigns letter code *ABC* to John Smith and includes enclosure *XYZ.* XYZ is not already included in the Enclosures Assigned (Softcopy) group box for run control *AAA.* If you don't refresh the list to cause *XYZ* to be included before the next run, the process will not generate the XYZ letter for John Smith.
Report Name,Data Source, and **Template List**	These fields behave the same in the Enclosures Assigned (Softcopy) group box as in the Letter Code Selection group box

No Matching Template Found

Use Default Template or **Do Not Produce Communication**	Select an option to specify what to do if the language and method combination to use for an ID is not listed in the template list for the report name selected. Select Use Default Template to use the template set as the default inside the report ID, or select Do Not Produce Communication to not produce the communication for an ID where no template is found. For example, if in the Communication Language Usage section the language to use is *Preferred* and the preferred language of the ID is *Italian* but no Italian template is associated with the specified report, do you want the system to use the default template, which in this case is the *English Letter* template, or do you want the system to skip the communication for that ID? **Note.** The option that you select applies to the main letter code, not to the enclosures. The process assumes that the report definition contains an enclosure code with at least one language and method combination that is the same as the one set for the main letter code. If the system does not find at least one that is the same, a message appears when you try to save the run control component or when the process runs and encounters the problem.

Communication Language Usage

Select options in this group box and in the Communication Method Usage box, to identify the template for the Communication Generation process to use.

Specified and **Language,** or **Preferred**	The system selects the Specified option by default and sets the Language field to the base language that was set at installation. You can change the language to use, however, the Template List group box for the main letter code must include a template that uses the language that you specify. If your institution supports language preferences, you can select Preferred to cause the system to evaluate and use the preferred language of each ID if any. When Preferred is selected, the Language field becomes unavailable. If your institution did not set communication preferences to *Support multiple languages* on the Installation CC page, then the system automatically selects the Specified option and makes both the Specified and Preferredoptions unavailable. You must specify the language to use.

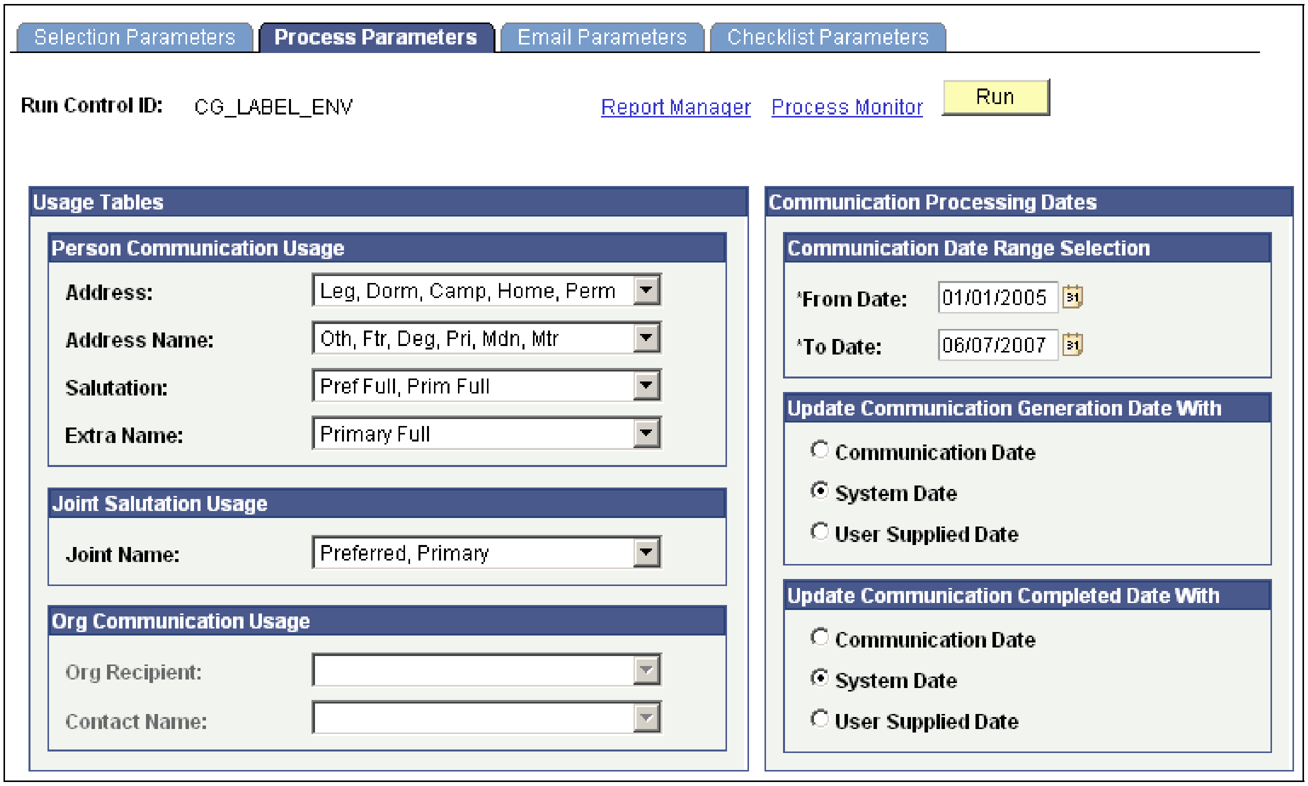
Communication Method Usage

Select options in this group box and in the Communication Language Usage group box, to identify the template for the Communication Generation process to use.

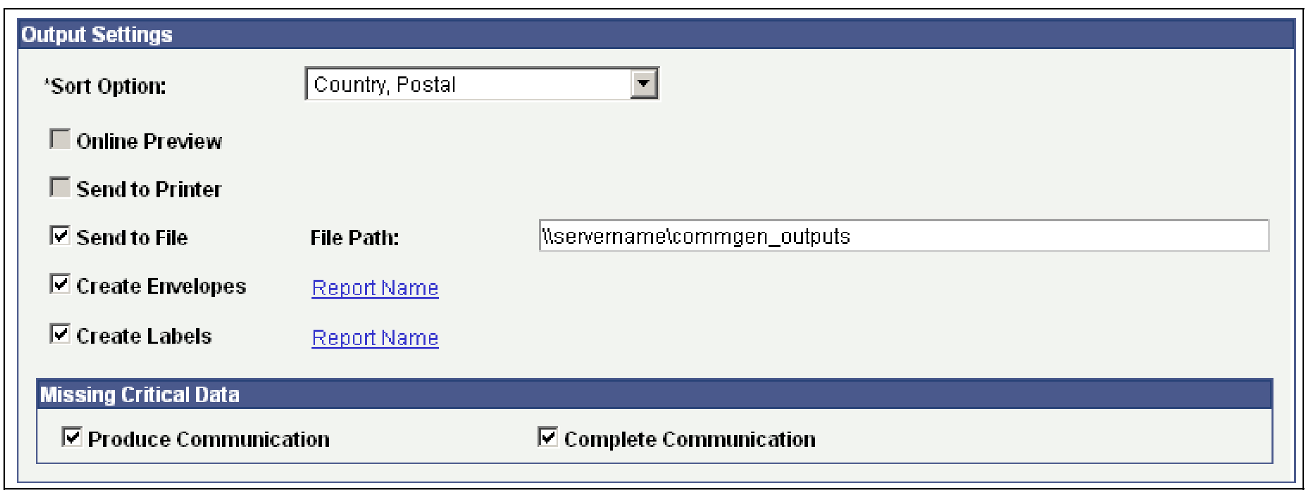
Specified and **Method,** or **Preferred**	The system selects the Specified option by default and sets the Method field to *Letter.* You can change the specified method, however the Template List group box for the main letter code must include a template that uses the method that you specify. If your institution supports method preferences, you can select Preferred to cause the system to evaluate and use the preferred method of each ID. When Preferred is selected, the Method field is unavailable. If your institution did not set communication preferences to *Support multiple methods* on the Installation CC page, then the system automatically selects the Specified option and makes both the Specified and Preferred options unavailable. You must specify the method to use.

Entering Process Parameters

Access the Process Parameters page (Campus Community, Communications, Communication Generation, Process Parameters).



Process Parameters page (1 of 2)



Process Parameters page (2 of 2)

Person Communication Usage

Fields in this group box are available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Person IDs, One Person ID,* or *Population Selection.*

If the field is available, you must enter the usage to use for searching for data for that field.

Address

Enter the type of address, from the Address Usage page, to extract for this communication. You can list address types in a preferred search-and-use order. For example, if you list an address usage that contains mailing, billing, and home address types, the system searches for the mailing address first; if none exists, then for the billing address; if none exists, for the home address last.

Warning! If the Communication Generation process encounters IDs that are set to receive an email but the address usage does not include email types, the process cannot send the email and therefore will not generate the communication for those IDs. When the method selected on the Selection Parameters page is *Email* or *Preferred*, then the address usage must include email types or a combination of address types and email types; at least one template for the main letter code must be for emails.

Address Name

Enter the type of name, from the Name Usage page, to extract for the address section of this letter. As with addresses, you can list address name types in a preferred search-and-use order.

Salutation

Enter the type of name, from the Name Usage Table page, that the system should extract for use in the opening or salutation of this communication. For example, you might want to use the individual's primary full name in the address section of the letter, but use his preferred first name in the salutation (Dear Dave). As with addresses, you can list salutation name types in a preferred search-and-use order.

Extra Name

The extra name is an additional way to extract name data using the name usage. For example, you might want to use the individual's primary full name in the address section of the letter (Mr. Juan M. Dominguez), his preferred first name in the salutation (Dear Juan), and his last name in the text to say "We are sure the Dominguez family will enjoy participating in this event." As with addresses, you can list ID name types in a preferred search-and-use order.

Joint Salutation Usage

The Joint Name field is available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Person IDs, One Person ID,* or *Population Selection,* and only if the letter code is set to permit joint communications. The available Joint Name values are applicable values from the Name Usage Table.

If the field is available, you must enter the name type to use in the salutation for joint communications.

Org Communication Usage

Fields in this group box are available for input only if the ID Selection field on the Selection Parameters page is set to *All IDs, All Org IDs,One Org ID,* or *Population Selection.*

If the field is available, you must enter the usage to use for searching for data for that field.

Org Recipient Enter the usage for the process to evaluate. The process evaluates this usage to find and retrieve the recipients to use for the organization communication.

Contact Name Enter the usage for the process to evaluate. The process evaluates this usage to find and the name type to use in the output for each organization recipient contact.

Communication Date Range Selection

Enter the date range of the communication records from which to extract data. For example, you might want to extract data only from IDs to which you assigned a specific letter code and set the communication date to between January 1 and March 1 of the current year.

The From and To date ranges are inclusive of the dates that you enter.

Update Communication Generation Date With

Select the date to use as the date when the communication is generated. When the Communication Generation process finishes, it enters this date in the Communication Generation Datefield in the Communication Management component for persons or organizations as appropriate.

Communication Date Select to use the communication assignment date from the Person Communication page for individuals or the Organization Communication page for organizations, to use as the date of generation.

System Date Select to extract the current system date to use as the date of generation.

User Supplied Date Select to use the specified date as the date of generation. You must supply the desired date.

Update Communication Completed Date With

Select the date for the system to use as the communication completed date on the communication record.

Communication Date Select to use the date when the communication was assigned as the communication completed date.

System Date Select to use the current system date as the communication completed date.

User Supplied Date Select to use the specified date as the communication completed date. You must supply the desired date.

Output Settings

Specify how to sort the generated outputs. You can choose to preview a sample of the outputs before running the process, or if the communication is a letter, you can choose to send the output directly to the printer for printing.

Warning! If you do not select either Preview Online or Send to Printer, when the process runs it generates the communication. If, in the Standard Letter Table CS component, Letter Printed Data is set to either *Name/Address Only* or *All* for the letter code, then the process saves the data indicated and inserts the View Generated Communication link in the Person or Organization Communication Management components. You must manually navigate to the Communication Management component for each of the processed IDs to view or print the final outputs individually. If the Letter Printed Data is set to *None* for the letter code, the process generates the communications, but does not save data or make the output retrievable. If the communication is an email, the process sends the email to the specified IDs.

Sort Option

Enter how to sort the generated outputs.

Available options are:

All Alphabetically by ID Type to sort first, organization communications sorted alphabetically by the first letter of each recipient's name, contact, department, or location name depending on how the output is addressed, and then individual communications alphabetically by each recipient's last name/first name.

Country, Postal (default value) to sort by each recipient's postal or zip code. Use this sort option to streamline mass mailings sent through the postal service.

Country, Postal by ID Type to sort first, organization communications by each recipient's country and postal address, and then individual communications by each recipient's country and postal address.

Online Preview

Select to preview the output online in PeopleSoft Report Manager.

When selected, the system sends a sample of all related outputs to PeopleSoft Report Manager with corresponding links for you to click to preview each output. For example, if an ID has two enclosures and three communication recipients, Report Manager displays a total of 12 document links labeled with the report definition name for each letter code and the name of each recipient. One document link is for the main letter code output and two links are for the enclosures associated with the main ID. The same links appear for each of the three recipients.

Note. Previews do not cause communications to be marked *Completed* and no information is entered in the Person or Organization Communication Management components for the communication.

When generating communications for multiple IDs, the online preview functionality extracts data for previews of only the first 10 IDs and their enclosures and recipients.

Email Address

If the communication method usage is either *Email* or *Preferred* on the Selection Parameters page and the *Online Preview* check box is selected, then the Email Address field appears.

Enter an email address whose inbox you can access to see how the emails will be sent. When you provide an email address for online previewing, the generated outputs do not appear in the PeopleSoft Report Manager.

Continuing with the example from the Online Preview field, the email address that you enter will receive four different emails: one for the main ID and one for each of the three recipients. The enclosures will be attachments to the emails. If an email is missing for a specific recipient, it is probably because no email address exists in the Related ID (or Name) field in the Relationships component.

Note. The Communication Generation process uses the main letter code template as the body of the email text. To do so, the process automatically converts the format of the main letter template to HTM format. Enclosures, if assigned, are not converted. The process includes them as attachments using the default output format set in the report definition.

See *PeopleTools: PeopleSoft Process Scheduler, "Using Report Manager."*

Send to Printer and **Destination Printer**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Send to Printer* option is available.

Select the check box to send letter communications directly to the printer. When selected, the Destination Printer field appears. You must enter the path to the printer.

When you are generating letters, you can retrieve the output at the specified printer or by clicking the View Generated Communication link in each processed ID's Person or Organization Communication component (if the letter code is set to save the data to the communication record), or both.

Note. If, on the Selection Parameters page, the communication method usage is *Email* or the Online Preview check box is selected, then the Send to Printer option is unavailable. You cannot send an email to the printer, nor can you send communications set to Online Preview to the printer.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

Send to File and **File Path**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Send to File* option is available.

Select the check box to save the generated letter communications as a single file. When selected, the File Path field appears. You must specify the file path to use.

When the process runs, it sorts and merges all the final letters into one file and saves it to the file path that you entered. The filename is *CommGen_<process instance nbr>.pdf,* where *<process instance nbr>* is the unique process instance number assigned by the Communication Generation process for that run.

You can use the file to make last-minute changes to the communications or send to a third-party vendor such as a mailing company.

Note. If, on the Selection Parameters page, the communication method usage is *Email* or the *Online Preview* check box is selected, then the *Send to File* option is unavailable. You cannot save an email to a file, nor can you save communications set to *Online Preview* to a file.

When you are generating letters, you can retrieve the output from the file at the destination you specify or by clicking the View Generated Communication link in each processed ID's Person or Organization Communication component (if the letter code is set to save the data to the communication record), or both.

Note. The file created is a .pdf file regardless of the format type defined in the report definition associated with the letter code.

See *PeopleTools: Oracle BI Publisher for PeopleSoft.*

Create Envelopes, Create Labels and **Report Name**

If the communication method usage is either *Letter* or *Preferred* on the Selection Parameters page, then the *Create Envelopes* and *Create Labels* options are available.

Select the appropriate check box to generate envelopes or address labels for the letter communications.

When selected, the Report Name link appears. You must select the report definition for the Communication Generation process to use. The report definition enables the process to retrieve address information from the associated data source to merge into the appropriate envelope or label template.

Only the report definitions that are created with a data source configured with the same administrative function used in the main letter code are available. For example, if the main letter code has a data source configured for the ADMA administrative function, then only the report definitions created with a data source set up for administrative function ADMA are available for envelopes and labels.

Warning! The Communication Generation process does not re-extract data for envelopes and labels. It reuses the data extracted for the main letter code report definition to merge inside the envelope or label template. This ensures consistency between the address, the salutation information printed on the letter, and the name and address on the envelopes and labels. If you need to extract additional data to include on the envelopes or labels (for example, you might want to print the name of the admissions recruiting center for the ID on the envelope or label), then you must include the data inside the data source of the report definition for the main letter code. If the data is not in the data source for that report definition, it will not be extracted.

When the *Send to File* option is selected and you select *Create Envelopes* or *Create Labels,* the process sorts and merges all the address data into one file and saves it to the file path that you entered. The process applies the salutation, address, and sort order specified for the main letter to the corresponding envelopes and labels.

The filename for envelopes is *CommGenENV_<process instance nbr>.pdf* and the filename for labels data is *CommGenLBL_<process instance nbr>.pdf*, where *<process instance nbr>* is the unique process instance number assigned by the Communication Generation process for that run.

Note. When *Send to File* is selected, the file format is always .pdf regardless of the format type defined in the Report Definition used for generating the labels or envelopes

When the letter code is set to save data to the communication record and the *Create Envelopes* option is selected, the Communication Generation process saves the respective envelope inside each processed ID's Person or Organization Communication Management component. Click the View Generated Communication link, and then the View Envelope link to view and reprint the envelope if needed.

Note. The *Create Labels* option does not make the generated label available inside the Person or Organization Communication Management component for the IDs processed. Use the *Create Envelopes* option to recreate the label if needed.

Envelope Printer and **Label Printer**

If the *Send to Printer* check box is selected and you select the *Create Envelopes* or *Create Labels* options, the Envelope Printer or Label Printer field appears. Enter the path to the printer that is set up to print envelopes or to the printer that is set up to print labels.

Report Definitions for labels and envelopes must use the same administrative function as the administrative function associated with the main letter code. Consider creating report definitions and data sources for each administrative function that you use. The following table provides an example of delivered elements for labels and envelopes for three sample administrative functions.

Admin Function	*Data Source*	*Label Template*	*Envelope Template*	*Label Report Definition*	*Envelope Report Definition*
ADMA	QA_CS_LBLENV_ADMA	QA_CS_CC_LABEL.rtf	QA_CS_CC_ENVELOPE.rtf	QA_CSLBLADMA	QA_CSENVADMA
AVIN	QA_CS_LBLENV_AVIN	QA_CS_CC_LABEL.rtf	QA_CS_CC_ENVELOPE.rtf	QA_CSLBLAVIN	QA_CSENVAVIN
GEN	QA_CS_LBLENV_GEN	QA_CS_CC_LABEL.rtf	QA_CS_CC_ENVELOPE.rtf	QA_CSLBLGEN	QA_CSENVGEN

See *PeopleTools: Oracle BI Publisher for PeopleSoft, "Creating Report Templates."*

Warning! When generating letters, you must select either *Send to File* or *Send to Printer* to ensure the ability to retrieve and view the letter outputs. If you do not select either *Send to File* or *Send to Printer*, you must manually navigate to each processed ID's communication component to retrieve and view the output. However, the output is in the communication record only if the assigned letter code is set to save it there.

For emails, the process automatically sends the generated communication to each processed ID. You cannot retrieve and view an email output before sending. You can however, select *Send to File* or *Send to Printer* to retrieve and view the email that was sent.

Missing Critical Data

Produce Communication

Select this check box for the process to produce the communication even if critical data is missing, for example, even if address information or name of the recipient is missing.

Complete Communication

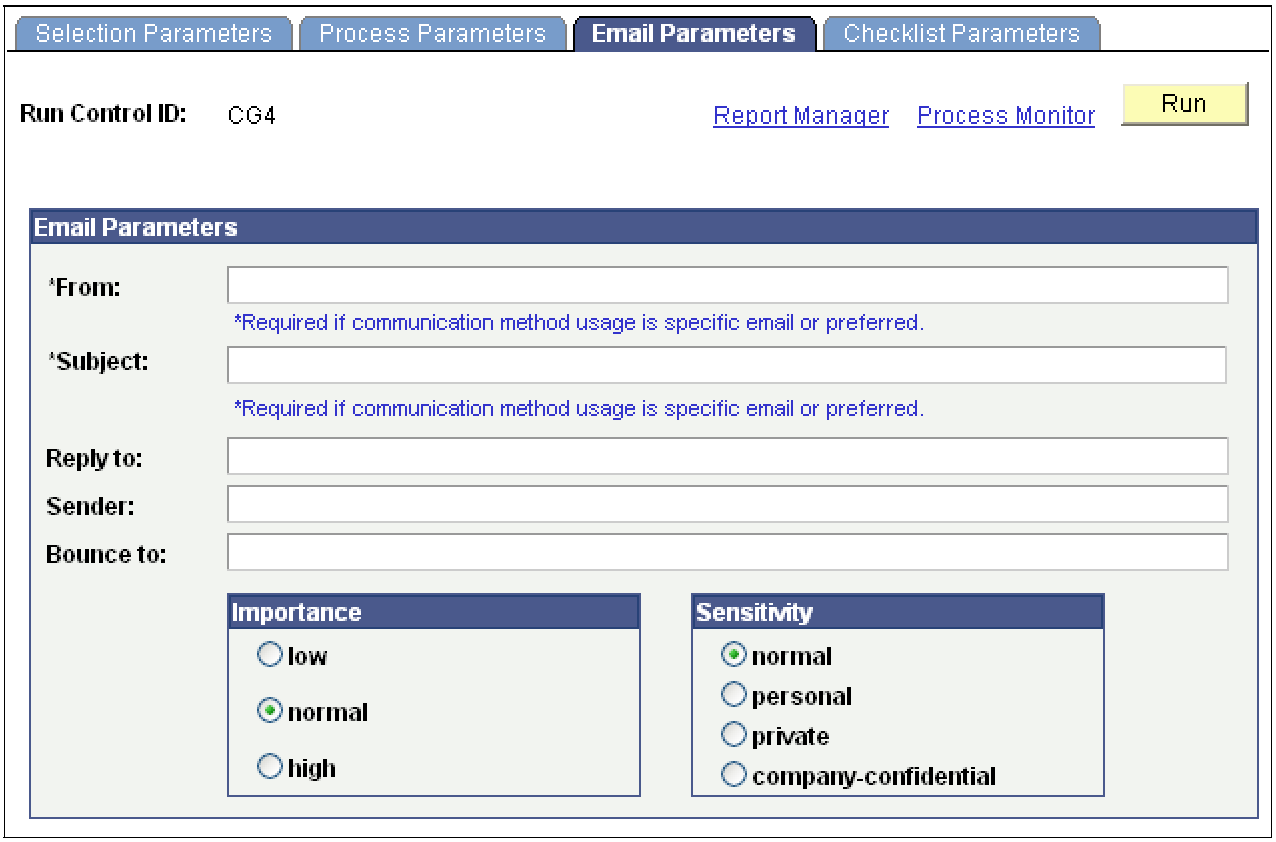
Select this check box for the process to set the status to *Complete* on the communication record, even if critical data is missing.

Critical data is set in the Communication Data Source component.

Note. If Email Address for Person for individuals or Organization Recipient Email and URL information for organizations, is not marked as critical data, the process considers the email address to be critical data for generating an email.

Entering Email Parameters

Access the Email Parameters page (Campus Community, Communications, Communication Generation, Process Parameters).



Email Parameters page

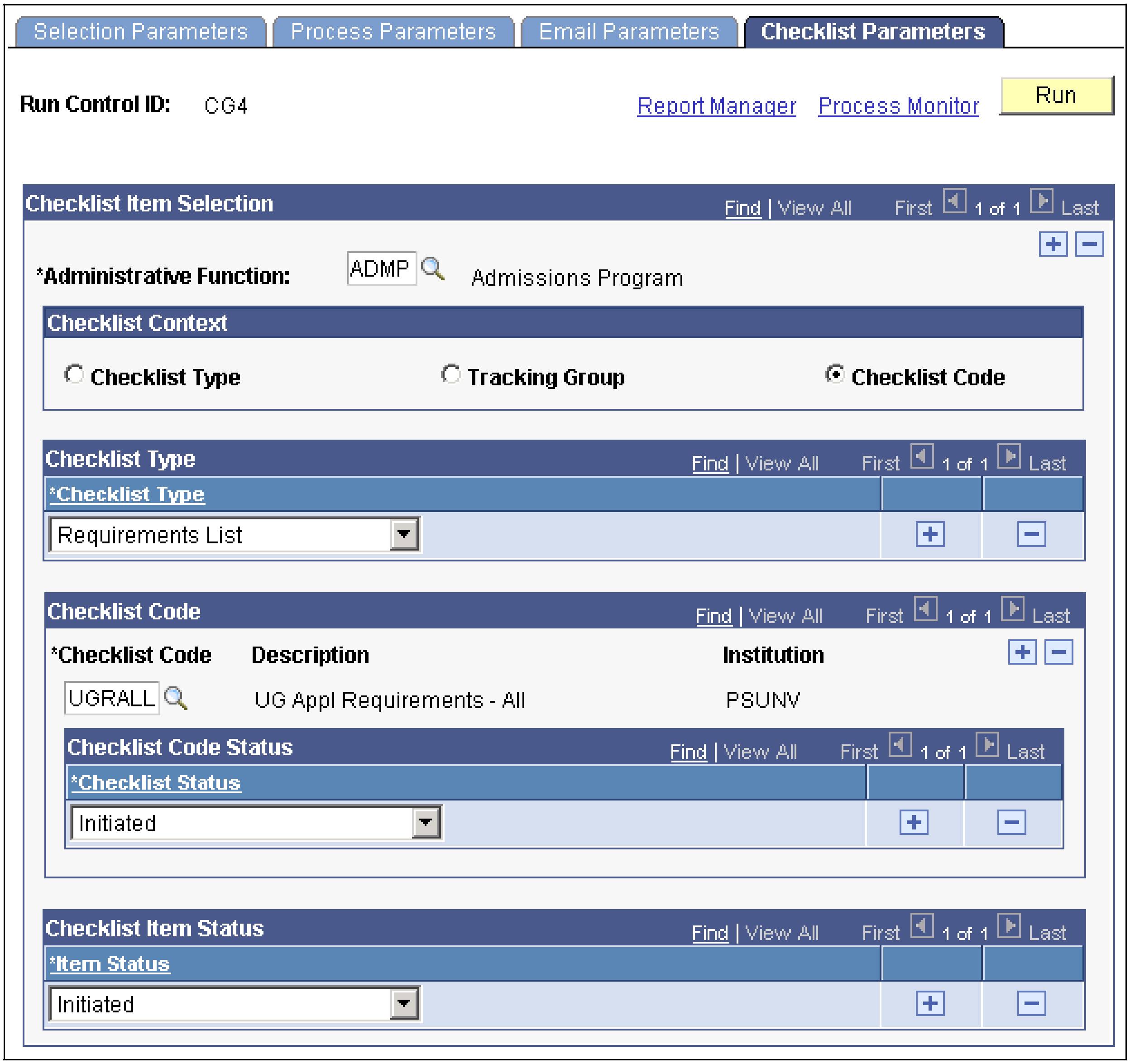
From	Enter the email address of the person or entity that is sending the email. This email address will replace any default email address that your institution's server might use to indicate from whom an email was sent. You can use this for cosmetic appearance. For example, if the Registrar Office sends the email, you might enter *Registrar_Office@university.com.* The email address may be valid or not. If it is not, your template should include text similar to: *This email was sent by an automated system. Do not reply to this email address.* This field is required if the communication method usage is *Specific Email* or *Preferred.*
Subject	You can enter email subjects for each email template language encountered on the Template Selection group box on the Selection Parameters page. If the Communication Language Usage option is set to *Preferred* on the Selection Parameters page then the system generates subject fields for each email template language encountered in the Template Selection group box. If zero or one email template is found, or if the Communication Language Usage option is set to *Specific,* then a single Subject field appears on this page. All Subject fields require a value when the Communication Language Usage option is set to *Preferred* and the Communication Method Usage option is set to either *Preferred* or *Email Specific.* When you click the Run button, the Communication Generation process (SCC_COMMGEN) retrieves the appropriate subject field from the SCC_CG_EML_RCTL table based on the email template language used to generate the communication.
Reply to, Sender, and **Bounce to**	(Optional) Enter values if your institution's email service uses these fields when sending emails. The Reply to email address must be valid. This is the email address that will appear when the recipient replies to the sender. It overrides the From email address. The Bounce To address is a valid email address set to receive all emails that do not send successfully.

Importance and Sensitivity

Options that you select in these group boxes appear in the email transmission for the recipient to see.

Entering Checklist Parameters

Access the Checklist Parameters page (Campus Community, Communications, Communication Generation, Email Parameters).



Checklist Parameters page

Checklist Item Selection

Administrative Function

Enter the administrative function associated with the checklists to use.

If the checklists that you want to use are associated with different administrative functions, use the add button to enter each administrative function and select the checklists and items associated with that function.

Checklist Context

Checklist Type, Tracking Group, or **Checklist Code**

Select the context by which to select the checklists to extract.

The fields on the page change based on the checklist context that you select.

Checklist Type

This group box appears regardless of which context you select.

Checklist Type

Enter the types of checklists from which the process should extract data for this letter or email.

You can select more than one checklist type for an administrative function. For example if you select *Requirement List,* the process extracts checklist information for checklist codes set up with that checklist type.

Checklist Code and Checklist Code Status

This group box appears only if you select a Checklist Context of *Checklist Code.*

If you select *Checklist Code,* then you must select a checklist status to use. The process will include only checklist codes with the status that you specify. You can select more than one checklist code for an administrative function and more than one checklist status for each checklist code.

Checklist Code

Enter the specific checklist codes whose checklist item data should be extracted for this letter or email.

You can specify more than one checklist code.

Checklist Status

Select the status of the checklists from which to extract data for this letter or email.

You can select either the status of *Completed* or *Initiated,* or you can add a row to list both.

Tracking Group and Tracking Group Status

This group box appears only if you select a Checklist Context of *Tracking Group.*

If you select *Tracking Group,* then you must select a group status to use. The process will include checklist items assigned to the tracking group and tracking group status that you specify. You can select more than one tracking group for an administrative function and more than one group status for each tracking group.

Tracking Group

Enter the tracking group codes whose checklist item data should be extracted for this letter or email.

You can enter more than one tracking group for an administrative function.

Group Status

Select the group status from which to extract checklist data for this letter or email.

You can select *Completed* or *Initiated,* or you can add a row to select both.

Checklist Item Status

Regardless of the context that you select, you must specify the checklist item status to use. You can select more than one checklist item status for an administrative function.

Available checklist item status values include: *Completed, Waived, Notified, Second Notification,* and so on.

Resetting Generated Communications

A successful run of the Communication Generation or Letter Generation process updates the following items on the communication record for each processed ID:

- Communication Generation Datefield.
- Communication Completed option.
- Date Activity Completed field.
- Unsuccessful Outcome option with its Reason field.
- Language,Method, and Process Used fields.
- View Generated Communication link (only for Communication Generation process and if setup allows it).

When the items are updated, the process sets the communication to *Communication Completed,* and neither the Communication Generation process nor the Letter Generation process will process that ID again for that communication.

If you need to generate the communication again or reset the fields (for example, if you mistakenly used the wrong template or selected the wrong IDs to process), then you must either manually navigate to each processed ID's Person or Organization Communication Management component and clear the Communication Completed check box, or use the Reset Communications page to reset the communication.

You can specify which of the processed IDs to reset: *All IDs, All Person IDs, All Org IDs, One Person ID,* or *One Org ID.*

Resetting clears the information from the communication record, refreshes the processing tables, and deletes from the XML storage tables. The Letter Generation process does not use processing tables that need to be refreshed.

Note. You must run reset the communication to refresh the processing tables if the Communication Generation process ends abnormally.

This section discusses how to reset the communication.

Page Used to Reset Generated Communications

Page Name	*Definition Name*	*Navigation*	*Usage*
Reset Communication	SCC_CG_RESET	• Campus Community, Communications, Reset Communication • Contributor Relations, Communications, Process Communications, Reset Communication • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Reset Communication	Reset the communications generated by the Communication Generation process or the Letter Generation process by clearing the Communication Completed check box and resetting the other values populated by the processes. Also reset the Communication Generation process tables if the process ended abnormally.

Resetting a Communication

Access the Reset Communication page (Campus Community, Communications, Reset Communication).

Reset Communication page

Process instance, Run Date/Time, and **Run Status**	Select the process instance number for which you want to reset a generated communication. Process instance numbers are available only for a process run status of *Success, No Success, Warning, Delete, Error,* or *Cancelled.* When the process instance number has a run status of *Success,* the Reset Communication process clears all process information that the Communication Generation process or the Letter Generation process added to the communication record for each processed ID. When the process instance number has a run status of *No Success, Warning, Delete, Error,* or *Cancelled,* the Reset Communication process clears all of the processing tables, so that you can run the process to generate the communication again.
ID Selection, Person ID, and **Org ID**	Specify which IDs within the process instance to reset. Only the IDs generated in the specified process instance are available. • Enter *All IDs* to reset all of the processed IDs. • Enter *All Person IDs* or *All Org IDs* to reset all of the person IDs or all of the organization IDs that were processed. • If you enter *One Person ID* or *One Org ID,* the Person ID or the Org ID field appears. You must enter the ID.

Click the Run button to invoke the SCC_CG_RESET Application Engine process. The system does the following:

1. Clears rows in the process tables that were used for the specific Communication Generation run.

   The process tables are: SCC_COMMGEN_AET, SCC_CG_PRCS_AET, SCC_CG_MERG_TBL, SCC_CG_PRCS_TBL and SCC_CG_TRGT.

2. Identifies the communications to reset based on the ID Selection dropdown on the run control page.

3. For each communication identified in step 2, deletes from the XML storage tables (SCC_CG_ATTDET, SCC_CGR_ATTREL, SCC_ORG_CTC_ATT, SCC_ORG_DPT_ATT and SCC_ORG_LOC_ATT).

4. For each communication identified in step 2, updates the process-related fields on the PS_COMMUNICATION table:

   - COMPLETED_COMM='N'
   - COMPLETED_ID=' '
   - COMPLETED_DT =%DateNull
   - UNSUCCESSFUL='N'
   - OUTCOME_REASON=' '
   - LETTER_PRINTED_DT=%DateNull
   - PROCESS_INSTANCE=0
   - SCC_COMM_MTHD=' '
   - SCC_COMM_LANG=' '
   - SCC_COMM_PROC=' '

Reviewing Communications

This section discusses how to:

- Review extract data for a communication.
- Review extract data for an additional individual recipient.
- Review a summary of communications.
- Review 3C Group access to a communication.
- Review details of a communication.

Pages Used to Review Communications

Page Name	*Definition Name*	*Navigation*	*Usage*
Communication Letter Data	COMM_LTR_DATA	Campus Community, Communications, Person Communications, Communication Letter Data	Review extract data for a communication assigned to an individual. This page can only be updated by Letter Generation extract process.

Page Name	***Definition Name***	***Navigation***	***Usage***
Organization Communication Letter Data	ORGCOMM_LTR_DATA	Campus Community, Communications, Organization Communications, Org Communication Letter Data, Communication Letter Data	Review extract data for a communication assigned to an organization. This page can only be updated by Letter Generation extract process.
Communication Recipient Data	COMM_RECPNT_DATA	• Campus Community, Communications, Person Communications, Communication Letter Data, Communication Recipient Data • Campus Community, Communications, Person Communications, Communication Management, Communication Recipient Data • Contributor Relations, Communications, Communications - Person, Communication Letter Data, Communication Recipient Data • Contributor Relations, Constituent Information, People, Communications, Communication Letter Data, Communication Recipient Data • Contributor Relations, Constituent Information, People, Communications, Communication Management, Communication Recipient Data • Contributor Relations, Communications, Communications - Person, Communication Management, Communication Recipient Data	View data for an additional individual recipient.

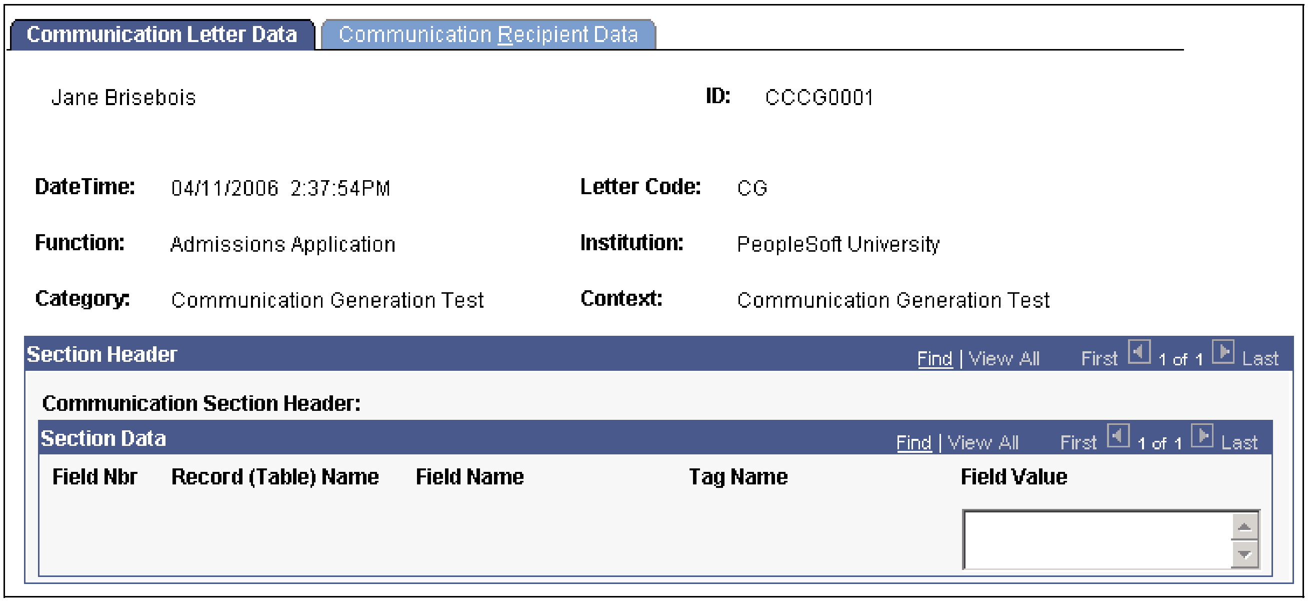
Page Name	***Definition Name***	***Navigation***	***Usage***
Communication Summary	COMM_SUMMARY	• Campus Community, Communications, Person Communications, Communication Summary • Student Admissions, 3 C's and Event Summaries, Communication Summary • Student Recruiting, 3 C's and Events Summaries, Communication Summary • Contributor Relations, Communications, Communications - Person, Communication Summary • Contributor Relations, Constituent Information, People, Communications, Communication Summary • Self Service, Outreach, View person information, Constituent Information, Communication Summary • Records and Enrollment, 3 C's Summaries, Communication Summary • Student Recruiting, Student Recruiters, Summaries, Communication Summary	Search for and review a summary of communications to or from an individual.

Page Name	***Definition Name***	***Navigation***	***Usage***
Org Communication Summary	ORG_COMM_SUMMARY	• Campus Community, Communications, Organization Communications, Org Communication Summary • Contributor Relations, Communications, Communications - Organization, Communication Summary - Org, Org Communication Summary • Contributor Relations, Constituent Information, Organizations, Communications, Org Communication Summary • Self Service, Outreach, View Organization Information, Constituent Information - Org, Communication Summary	Review communications with an organization.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	• Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary • Campus Community, Communications, Organization Communications, Org Communication Summary, Operator 3C Groups Summary	View 3C group inquiry and update access to communications with individuals or organizations.
Person Communication Management	COMM_MGMT1	Campus Community, Communications, Person Communications, Communication Detail, Communication Detail	View details of a communication assigned to an individual.

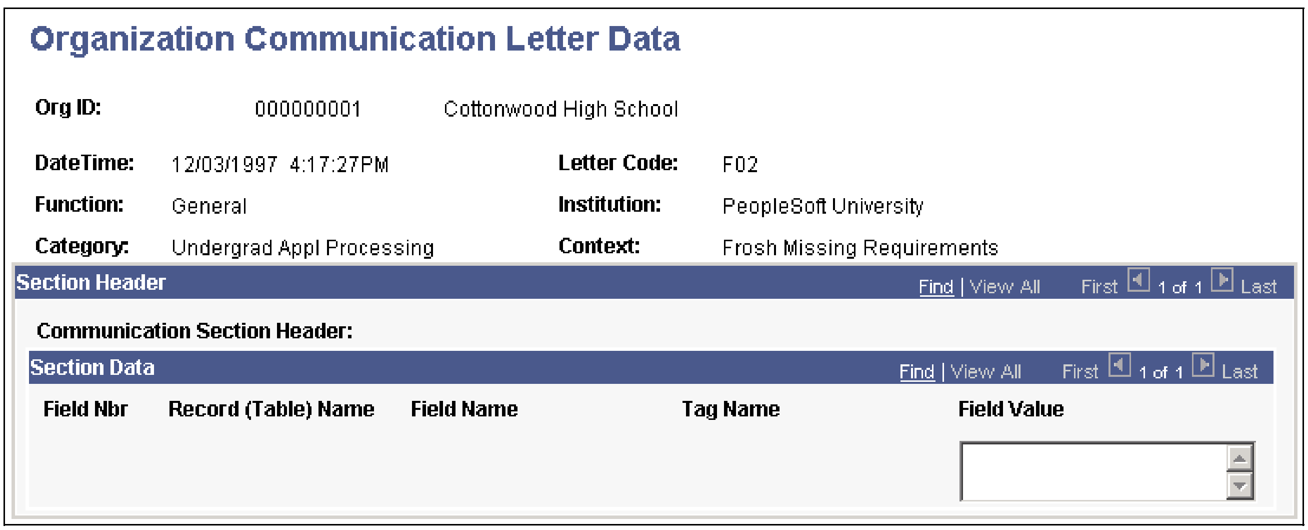
Page Name	Definition Name	Navigation	Usage
Org Communication Detail	ORG_COMM_MGMT1	Campus Community, Communications, Organization Communications, Org Communication Detail	View the details of a communication assigned to an organization.
Organization Comm Recipients	ORG_COMM_MGMT2	• Campus Community, Communications, Organization Communications, Org Communication Detail, Organization Comm Recipients • Contributor Relations, Constituent Information, Organizations, Communications, Organization Communication • Contributor Relation, Communications, Communications - Organization, Organization Communication	View the details of the recipients set to receive a communication that is assigned to an organization.

Reviewing Extract Data for a Communication

Access the Communication Letter Data page (Campus Community, Communications, Person Communications, Communication Letter Data) or the Organization Communication Letter Data page (Campus Community, Communications, Organization Communications, Org Communication Letter Data, Communication Letter Data).



Communication Letter Data page



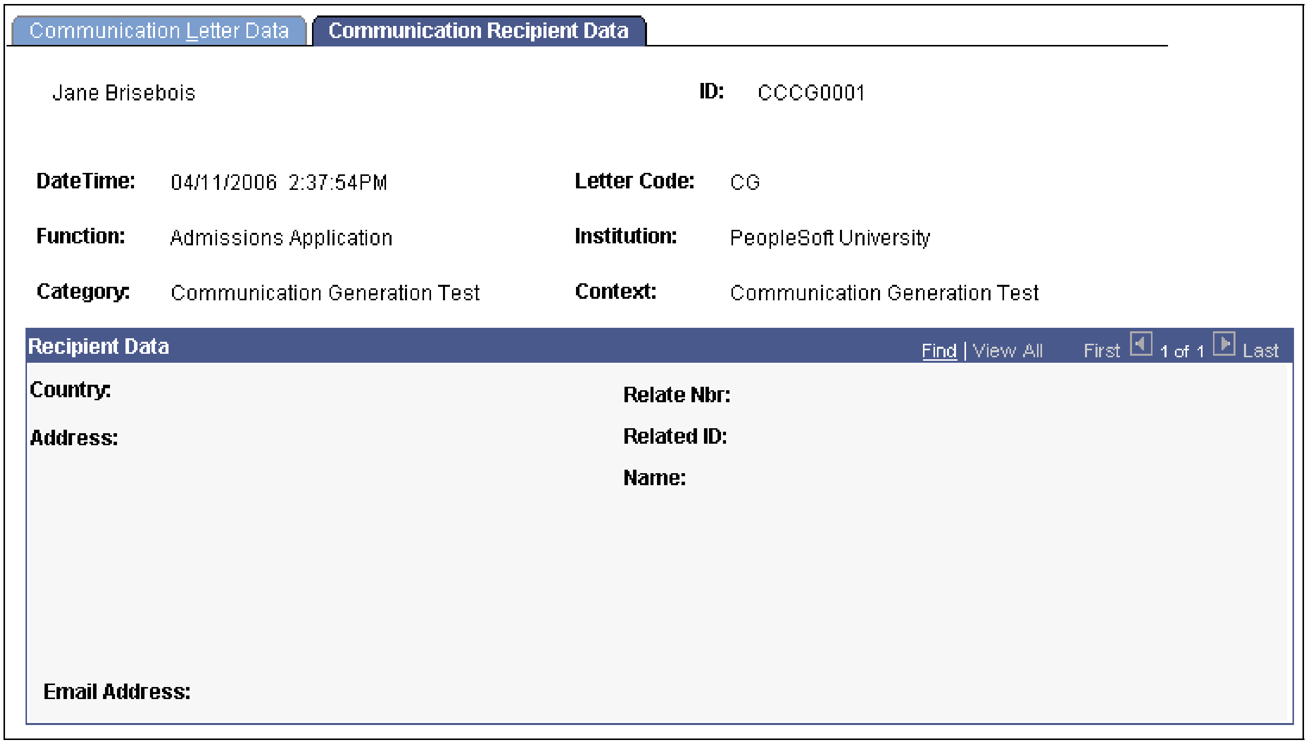
Organization Communication Letter Data page

The Communication Letter Data page and the Organization Communication Letter Data page are for viewing purposes only; you cannot enter or modify data. Information on this page is controlled from the Letter Printed Data value set in the Standard Letter Table CS component. Use this page to review the data extracted for an ID as the result of the Letter Generation process.

Note. The Communication Generation process does not update the page. Instead it makes the final outputs accessible from View Generated Communication link in the Person and Organization Communication components.

Reviewing Extract Data for an Additional Individual Recipient

Access the Communication Recipient Data page (Campus Community, Communications, Person Communications, Communication Letter Data, Communication Recipient Data).

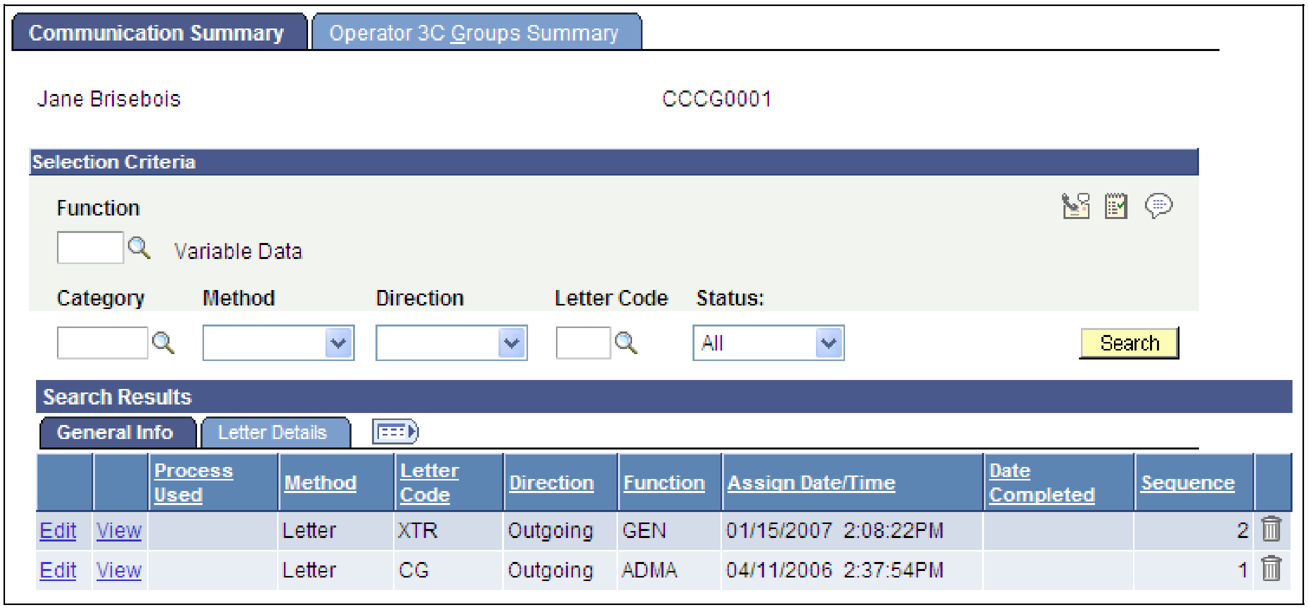


Communication Recipient Data page

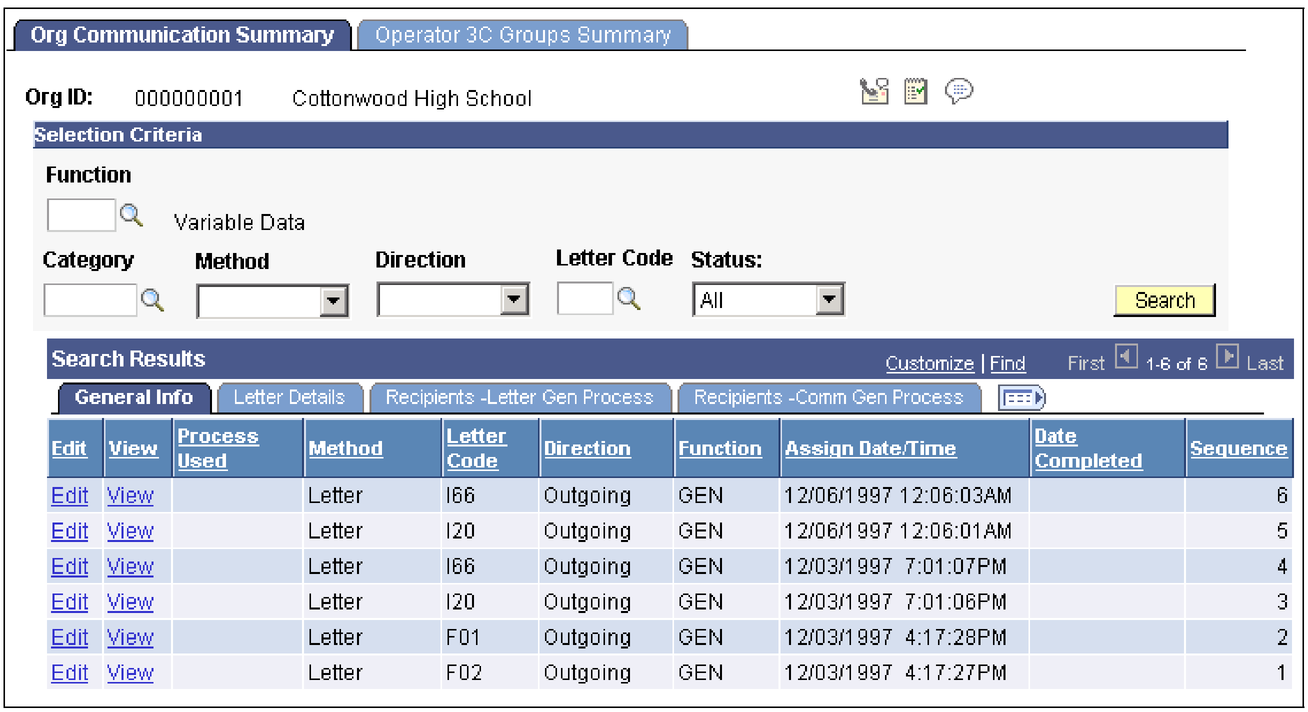
The Communication Recipient Data page is view-only; you cannot enter or modify data. Information appears on this page only if you have set up a separate recipient on the Communication Recipient page in the Relationships component for the specified letter code. The page is updated by both Letter Generation and Communication Generation process.

Reviewing a Summary of Communications

Access the Communication Summary page (Student Admissions, 3C's and Event Summaries, Communication Summary) or the Org Communication Summary page (Campus Community, Communications, Organization Communications, Org Communication Summary).



Communication Summary page



Org Communication Summary page

Note. Multiple views of the page are available by clicking the tabs in the group box. We document fields that are common to all views first.

Common Page Information: Selection Criteria Region

If you click the Search button without entering any values, the system searches for all communications for the individual or organization and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function

Enter the administrative area on which to search.

Variable Data

Click to access the Variable Data page, where you can add values to search on for specific variable data related to the administrative function that you selected.

If no variable data is required or allowed for the administrative function selected, the Variable Data link is unavailable.

Category

Enter the category from the Communication Categories page, for which to search.

Method

Enter the method from the Communication Contexts page, for which to search.

Direction

Enter the direction from the Communication Contexts page, for which to search.

Letter Code

Enter the letter code from the Standard Letters Table page, for which to search.

Status

Enter the status of the communications for which to search.

Available values are:

All: The system searches for all communications regardless of status.

Complete: The system searches only for completed communications.

Incomplete: The system searches only for incomplete communications.

Search

Click to launch the search based on the criteria you selected.

General Info Tab

For the Organization Summary page, the Process Used field indicates if the recipient's information is in the Recipients - Letter Gen Process or the Recipients - Comm Gen Process tab.

Click the trash can icon to delete any communication from the recipient's record. The icon appears under these conditions:

- The system is configured, on the Installation Default - CC page, to allow individual communication deletion.
- 3C Group Security allows the user to access the particular records.

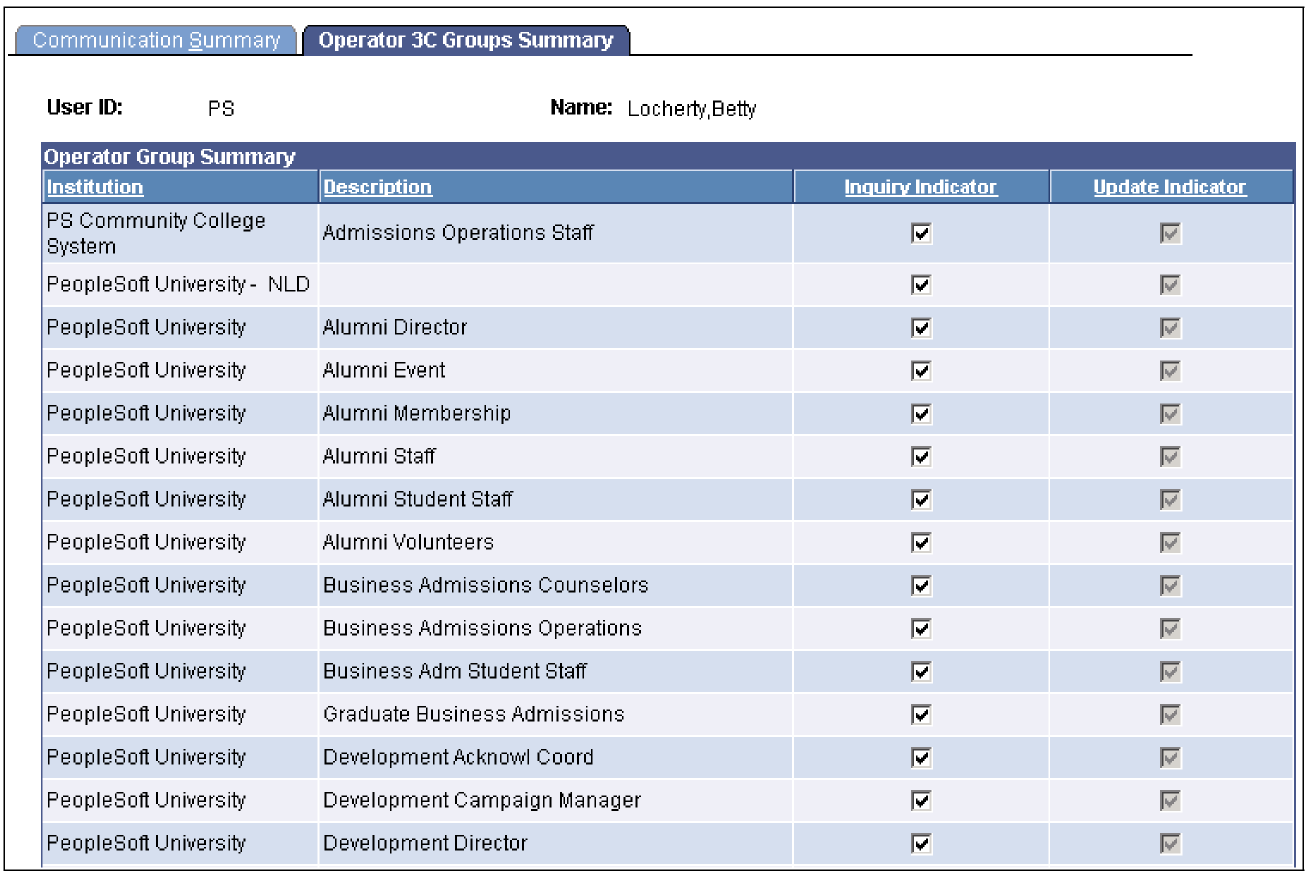
Letter Details Tab

Use the Letter Details tab to determine if supplemental information is provided about the communication, such as enclosure letter codes and descriptions if enclosures were included, the related ID if the communication was joint, and the category and context for the communication.

Note. A joint communication can be assigned to only one of the two individual IDs. However, when a joint communication is assigned, the communication is listed in the summary for both IDs. For example, if you assign a joint communication to primary ID 12345 with the related ID 13578 and you view the summary for ID 12345, the joint communication check box is selected and no related ID value appears. When you view the summary for (related) ID 13578, however, the joint communication check box is selected and the related ID of 12345 appears.

Reviewing 3C Group Access to a Communication

Access the Operator 3C Groups Summary page (Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary or Campus Community, Communications, Person Communications, Communication Summary, Operator 3C Groups Summary).



Institution	Description	Inquiry Indicator	Update Indicator
PS Community College System	Admissions Operations Staff	☑	☑
PeopleSoft University - NLD		☑	☑
PeopleSoft University	Alumni Director	☑	☑
PeopleSoft University	Alumni Event	☑	☑
PeopleSoft University	Alumni Membership	☑	☑
PeopleSoft University	Alumni Staff	☑	☑
PeopleSoft University	Alumni Student Staff	☑	☑
PeopleSoft University	Alumni Volunteers	☑	☑
PeopleSoft University	Business Admissions Counselors	☑	☑
PeopleSoft University	Business Admissions Operations	☑	☑
PeopleSoft University	Business Adm Student Staff	☑	☑
PeopleSoft University	Graduate Business Admissions	☑	☑
PeopleSoft University	Development Acknowl Coord	☑	☑
PeopleSoft University	Development Campaign Manager	☑	☑
PeopleSoft University	Development Director	☑	☑

Operator 3C Groups Summary page

You can review the inquiry and update access of the 3C groups that have access to the communication, and you can change the inquiry access for a group on this page. You cannot change the update access.

Reviewing Details of a Communication

The Communication Detail and Org Communication Detail pages are view-only versions of the Person Communication Management and Organization Communication pages where you assign the communications. You can view the details of an assigned communication on these pages, but you cannot enter or edit the data.

Using the Envelope and Label Generation Process

This section provides an overview of the Envelope and Label Generation (SCC_CGLABELS) process, and discusses how to:

- Enter selection parameters.
- Enter process parameters.

Understanding the Envelope and Label Generation Process

Use the Envelope and Label Generation process (SCC_CGLABELS) to generate envelopes and labels for a communication previously generated by the Communication Generation process (SCC_COMMGEN) (or for envelopes and labels previously generated by the Envelope and Label Generation process if you are rerunning them) or for a hardcopy communication that does not have a template in your PeopleSoft system, such as a brochure, flyer, post card, and so on.

For communications previously generated by the Communication Generation process, you can use the process to rerun the envelopes without having to reset and regenerate the full communication. Use the Communication Generation process instance number to ensure consistency in the name, address, and salutation data between the letter and the envelope or label.

For hardcopy communications, use the process to generate envelopes or labels for a specific set of IDs without extracting more data than required for an envelope or label (usually name and address data).

Note. You can use the Letter Generation process to generate labels and envelopes for hardcopy communications, but the process extracts all of the data that it would extract for a letter.

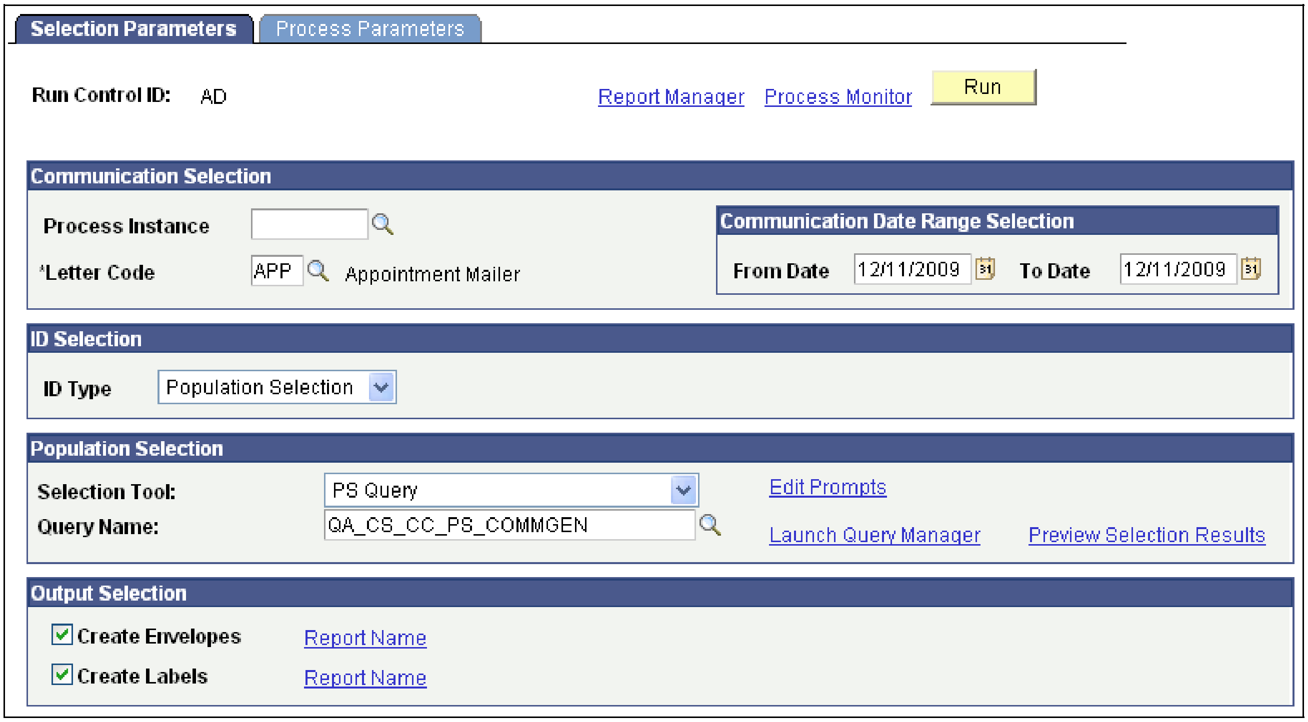
Warning! IDs that have a communication set to *Completed* either manually or by the Letter Generation process are not recognized by the Envelope and Label Generation process. The process recognizes and processes only communications completed by the Communication Generation process or the Envelope and Label Generation process.

Pages Used for the Envelope and Label Generation Process

Page Name	***Definition Name***	***Navigation***	***Usage***
Selection Parameters	SCC_CG_RUN_ENVLBL1	• Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Selection Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Selection Parameters • Contributor Relations, Communications, Process Communications, Selection Parameters	Specify general parameters for extracting name and address data for envelopes and labels.
Process Parameters	SCC_CG_RUNCTL2	• Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters • Contributor Relations, Session Management, Acknowledgements, Generate Acknowledgements, Process Parameters • Contributor Relations, Communications, Process Communications, Process Parameters	Specify usages and dates for the Envelope and Label Generation process to use, identify how the process is to handle missing critical data, and specify where the process is to place and sort the outputs.

Entering Selection Parameters

Access the Selection Parameters page (Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters).



Selection Parameters page

Communication Selection

Process Instance

If the communication was previously generated, select the process instance for which you want to generate envelopes or labels.

Only the process instances created by either the Communication Generation or the Envelope and Label Generation process are available to ensure that the data extracted by those processes is the same data that will be used to generate the envelopes and labels.

Note. The process instance number appears in the Process Instance field on the processed ID's Person Communication Management or Organization Communication Management page.

Letter Code

Enter the letter code of the item for which you want to generate envelopes and labels.

If you entered a process instance number, the letter code of the generated communication appears in the Letter Code field, and the field is unavailable.

If the communication has not been completed, enter the letter code for which you want to generate the envelopes and labels. For example, it could be a letter code for a hardcopy item (brochure, flyer, post card, or other) for which you want to generate envelopes and labels.

Note. All letter codes are available, whether or not they are set up for the Communication Generation process.

Communication Date Range Selection

This group box appears only when the letter code is entered manually.

From Date and **To Date**

Enter the date range of the communication records from which to extract data.

For example, you might want to extract data only from IDs to which you assigned a specific letter code and set the communication date to between January 1 and March 1 of the current year.

ID Selection

ID Type, Person ID, and **Org ID**

Specify the types of IDs for which you want to generate envelopes and labels. The choices are: *All IDs, All Org IDs, All Person IDs, One Org ID, One Person ID,* or *Population Selection.*

When a process instance number is entered, only the IDs processed within the process instance are available.

When a letter code is manually entered, the only IDs available for processing are the person IDs and organization IDs with that letter code assigned within the specified date range and where the communication is not completed.

If you enter *One Person ID* or *One Org ID,* the Person ID or the Org ID field appears. Enter the specific ID for which to generate the envelope or label.

Population Selection

This group box appears only when the ID type is *Population Selection.*

Selection Tool

Select the tool to use to identify the population for the process.

Only tools set to *Active* on the Selection Tool setup page and the applicable selection tools defined in the context definition for the process are available.

The PeopleSoft system delivers the following tools with a default status of *Active: Equation Engine, External File,* and *PS Query.*

Query Name, Equation Name, or **Attached File**

The field appears based on the selection tool specified.

Enter the name of the query or equation to use or upload the external file to use to select the desired population.

Output Selection

Create Envelopes, Create Labels, and **Report Name**

Select the appropriate check box to generate envelopes or labels or both.

When selected, the Report Name link appears. You must select the report definition to use. The report definition must contain the envelope or label template to use and enables the process to retrieve name address information from the associated data source to merge into the template.

Only the report names to which you have security access are available.

Note. When generating envelopes and labels from within the Communication Generation process, only the report definitions that are created with a data source configured with the same administrative function used in the main letter code are available. However, when generating envelopes and labels with the Envelope and Label Generation process, the data source associated with the report definitions does not need to match the administrative function of the letter code.

For example, with the Envelope and Label Generation process you can generate envelopes and labels for a letter code with the ADMA administrative function, and use a report definition with the GEN administrative function. This enables you to use a generic report definition to create envelopes and labels.

Warning! When a Process Instance number is entered the Envelope and Label Generation process does not re-extract data for envelopes and labels. It reuses the data extracted for the main letter code report definition to merge inside the envelope or label template. This ensures consistency between the address, the salutation information printed on the letter, and the name and address on the envelopes and labels. If you need to extract additional data to include on the envelopes or labels (for example, you might want to print the name of the admissions recruiting center for the ID on the envelope or label), then you must include the data inside the data source of the report definition for the main letter code. If the data is not in the data source for that report definition, it will not be extracted.

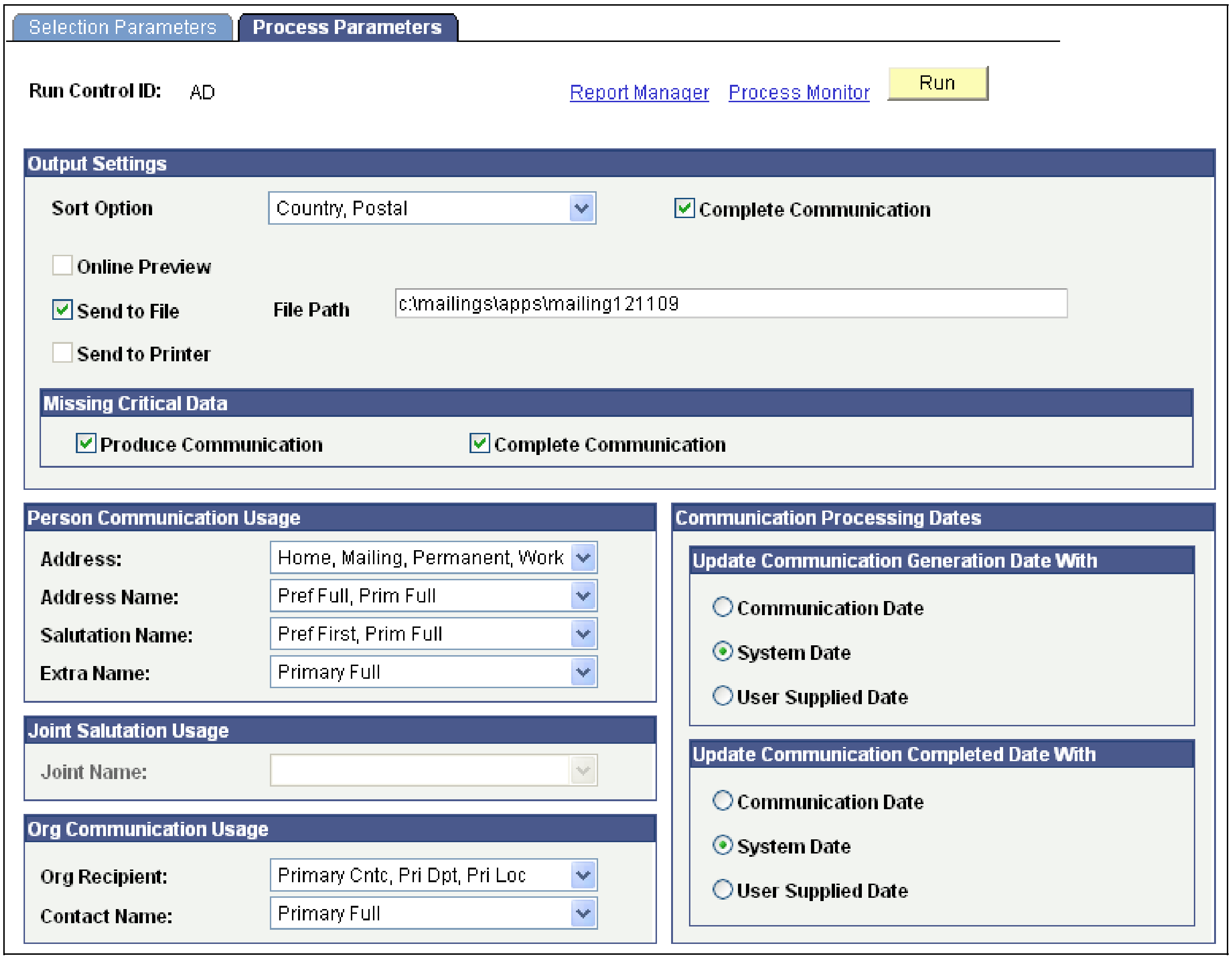
This table lists the predefined report definitions provided for generating envelopes and labels. You can use these as is or use them as samples from which to create your own templates:

Admin Function	*Report Name*	*Report Description*
GEN	QA_CSENVGEN	CommGen Envelope - GEN
GEN	QA_CSLBLGEN	CommGen Label - GEN
AVIN	QA_CSENVAVIN	CommGen Envelope - AVIN
AVIN	QA_CSLBLAVIN	CommGen Label - AVIN
ADMA	QA_CSENVADMA	CommGen Envelope - ADMA

Admin Function	*Report Name*	*Report Description*
ADMA	QA_CSLBLADMA	CommGen Label - ADMA

Entering Process Parameters

Access the Process Parameters page (Campus Community, Communications, Set Up Communications, Envelope and Label Generation, Process Parameters).



Process Parameters page

Output Settings

Sort Option

Enter how to sort the generated outputs. Available options are:

All Alphabetically by ID Type to sort organization envelopes and labels first, alphabetically by the organization description and then by the first letter of each recipient's name, contact, department, or location name depending on how the output is addressed, and then sort individual envelopes and labels alphabetically by each recipient's last name/first name.

Country, Postal to sort by each recipient's postal or zip code. Use this sort option to streamline mass mailings sent through the postal service. This is the default value.

Country, Postal by ID Type to sort organization envelopes and labels first, by each recipient's country and postal address, and then sort individual envelopes and labels by each recipient's country and postal address.

If a process instance number is entered, this field is unavailable. The process uses the sort option from the generated communication.

Complete Communication

Select to have the Envelope and Label Generation process mark the communication *Completed* for each processed ID.

When selected, the Envelope and Label Generation process updates the ID's communication record (Person Communication or Organization Communication page) by marking the communication Completed and displaying the View Generated Communication link. Use the link to retrieve and view the envelope output (the label output is the same as the envelope output).

Selecting this check box is especially useful for hardcopy letter codes that you want to consider completed after the envelopes or the labels are generated.

If a process instance is entered, the check box is cleared and unavailable for change.

Note. If you need to reset communications that have been marked *Completed* by the Communication Generation process or the Envelope and Label Generation process, use the Reset Communication process.

Online Preview

Select to preview the data, in envelope and label format based on the template in the specified report, online in PeopleSoft Report Manager.

When selected, the system sends a sample of all related outputs to PeopleSoft Report Manager with corresponding links for you to click to preview each output.

For example if you used the QA_CSXTRENV_GEN report to generate the envelopes, the system displays a QA_CSXTRENV GEN Extract Envelopes link in Report Manager. Click the link to open the .pdf file that contains the data in envelope format, for all of the processed IDs.

If you used the QA_CSXTRLBL_GEN report to generate the labels, the system displays a QA_CSXTRLBL GEN Extract Label Definition link in Report Manager. Click the link to open the .pdf file that contains the data in label format, for all of the processed IDs.

Note. Previews do not cause communications to be marked Complete and no information is entered in the Person or Organization Communication Management components for the communication.

When generating envelopes and labels for multiple IDs, the online preview functionality extracts data for previews of only the first 10 IDs and their enclosures and recipients.

Send to File and **File Path**

Select to send the data, in envelope and label format based on the template in the specified report, to the destination file that you specify.

Use the file to review the data before printing or use the file to send to a third-party such as a mailing service.

Note. When *Send to File* is selected, the file format is always .pdf regardless of the format type defined in the Report Definition used for generating the labels or envelopes.

Send to Printer, Envelope Printer, and **Label Printer**

Select to send the data, in envelope and label format, directly to the printer that you specify.

Missing Critical Data, Person Communication Usage, Joint Salutation Usage, Org Communication Usage and Communication Processing Dates

If a process instance number is entered, fields in these group boxes are unavailable. The process uses the settings from the generated communication. Otherwise fields in these group boxes are the same as described for the Process Parameters page in the Communication Generation component.

Note. While the Salutation Name field is most useful for generating a letter or email communication, you can also use the field to extract the name of an ID to create nametag labels. Your template might say: *Hello my name is <salutation name>* and your label printer might be set to print pages of name tags. As with addresses, you can list salutation name types in a preferred search-and-use order.

Deleting Communications

This section provides an overview of communication deletion and discusses how to:

- Delete individual communications.
- Delete communications in batch.

Understanding Communication Deletion

The Delete Communications batch component enables you to define high-level parameters for removing communications from the system. For example, the institution might want to purge old communication records that are no longer required, or might need to correct a communications assignment made in error. You can delete entire categories, or further define the parameters by letter code or specific date ranges. Population Selection functionality enables you to target specific subsets of IDs within your deletion parameters. Security is enforced at the category level based on the user's 3C Group security. To delete communications individually, use the Communication Summary component for people or the Org Communication Summary component for organizations.

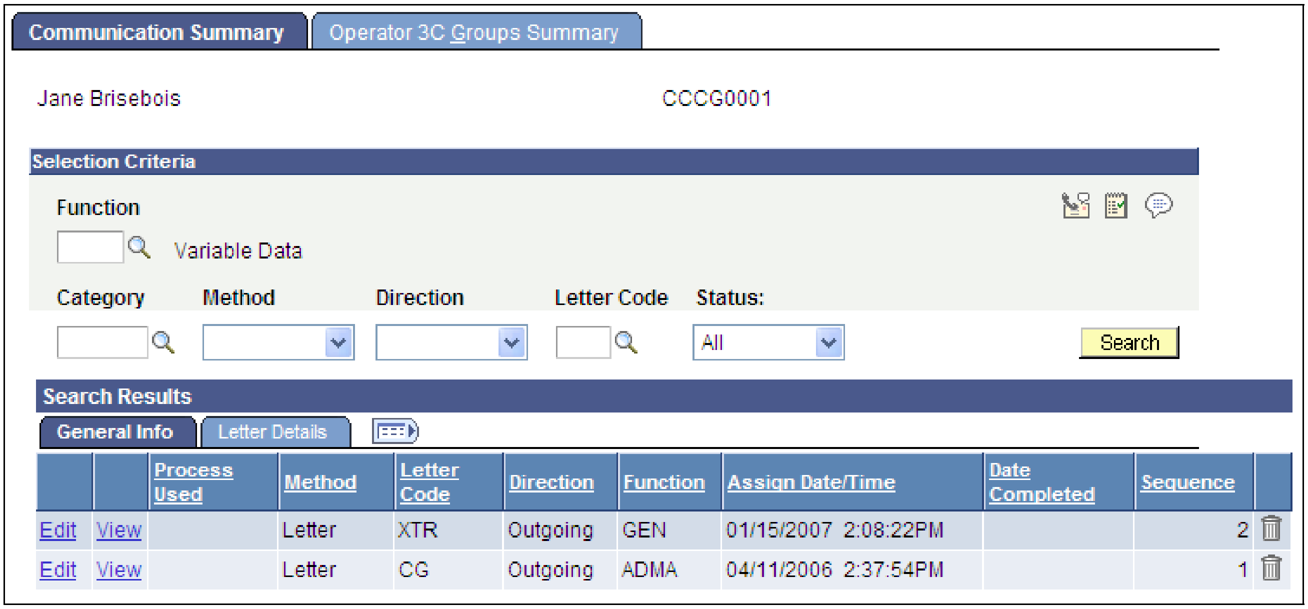
Pages Used to Delete Communications

Page Name	Definition Name	Navigation	Usage
Communication Summary	COMM_SUMMARY	• Campus Community, Communications, Person Communications, Communication Summary • Student Admissions, 3 C's and Event Summaries, Communication Summary • Student Recruiting, 3 C's and Events Summaries, Communication Summary • Contributor Relations, Communications, Communications - Person, Communication Summary • Contributor Relations, Constituent Information, People, Communications, Communication Summary • Self Service, Outreach, View person information, Constituent Information, Communication Summary • Records and Enrollment, 3 C's Summaries, Communication Summary • Student Recruiting, Student Recruiters, Summaries, Communication Summary	Search for and review a summary of communications to or from an individual.

Page Name	Definition Name	Navigation	Usage
Delete Communications	SCC_DEL_COMMUNICTN	Campus Community, Communications, Delete Communications	Define processing parameters to run the Delete Communications process.

Deleting Individual Communications

Access the Communication Summary page.



Communication Summary page

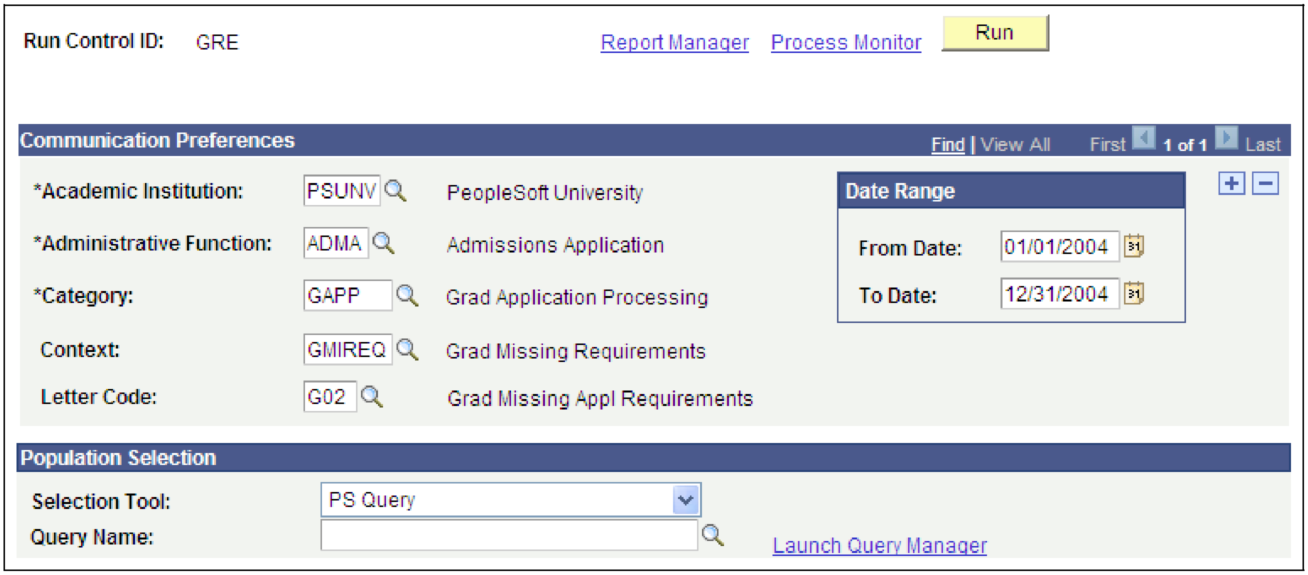
The system displays all communications accessible through individual 3C Group setup. To delete a communication, click the trash can button beside the row. Warning and confirmation messages appear. The system deletes the record when you save the page.

When you delete a communication, any enclosures associated with the communication are also removed. These enclosures share the same sequence number; since they considered subordinate, they do not have a trash can icon beside them and cannot be separately deleted here.

Note. Deleting a communication from a person does not remove it from any related recipients; to delete a communication from a related recipient, search for their record and remove it manually. Also, when you delete a communication, all related comments and checklist items remain.

Deleting Communications in Batch

Access the Delete Communications page.



Delete Communications page

Select one or more parameters to narrow the set of communication records to be deleted. The Academic Institution,Administrative Function, and Category fields are required; all other parameter selections are optional. To define a subset of specific IDs for which you want to delete communications, use the Population Selection group box.

This page allows for up to three rows of communication preferences. This limit has been applied to constrain the complexity of, and processing time needed for, the resulting SQL statement executed by the deletion process. Only the communication preferences are subject to this requirement. Note that the Population Selection parameter of the run control is only set once and is applied to all communication preference rows.

Administrative Function	Select an administrative function. The values available here are defined on the Administrative Function Table.
Category	Select a category of communications. The values available here are defined by 3C group security.
Context	Select a communications context. The values here are those valid under the Category selected.
Letter Code	Select a specific communication letter code. The values here are those valid under the Category and Context selected.
From Date and **To Date**	These fields are optional; however if used, both date fields must be completed and the From Date value must precede the To Date value.

Use the Population Selection group box to define a set of IDs, select a PS Query or define an external file. Queries available for selection have the 3C Delete Bind Record "SCC_3CDEL_BND" included in the query. IDs returned by the Population Selection process apply to all Communication Preference rows in the component.

After you specify the parameters, you can run the SCC_3CDELETE Application Engine process by clicking the Run button. When you click the Run button, the system searches for all communications matching the parameters specified on this page and deletes them. Only the target communications are deleted and any related checklists and comments remain, while maintaining the relationships between the relevant 3C tables.

Chapter 49

Managing Comments

This chapter lists prerequisites, provides an overview of comments, and discusses how to:

- Enter comments.
- Review comments.
- Delete comments.

Understanding Comments

You can enter and track comments about individuals and organizations. You can review all comments about an individual or organization or all comments entered by a specific individual. Because personal comments are subjective and often confidential, carefully analyze your institution's needs and requirements for entering and tracking comments. You should also be familiar with administrative functions and 3C group security before setting up or creating comments in your system.

 (comments)	With the appropriate security access, you can click the Create Comments button while on a page in a functional area about that individual or organization to attach or review comments to an individual's or an organization's record.

You can also navigate through the menus to access the comments pages described in this chapter.

Prerequisites

Set up comments, including comment categories and 3C comment groups, before entering comments for individuals or organizations.

Entering Comments

This section lists common elements and discusses how to:

- Enter comments about an individual.
- Enter comments about an organization.

- Review or change variable data.

Common Elements Used in This Section

Administrative Function The code for the administrative area with which this comment is associated.

3C Group The group of comment types to which a user has security access.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data (for the individual or organization) that is associated with the administrative function.

If you transfer to this page directly from a functional area, the variable data transfers from there. If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data transfers from the functional area.

 (communications) Click to transfer to the Person Communication page or the Organization Communication page, where you can add a new communication for the individual or organization.

 (checklists) Click to transfer to the Checklists Management 1 page or the Organization Checklist Management 1 page, where you can add a new checklist for the individual or organization.

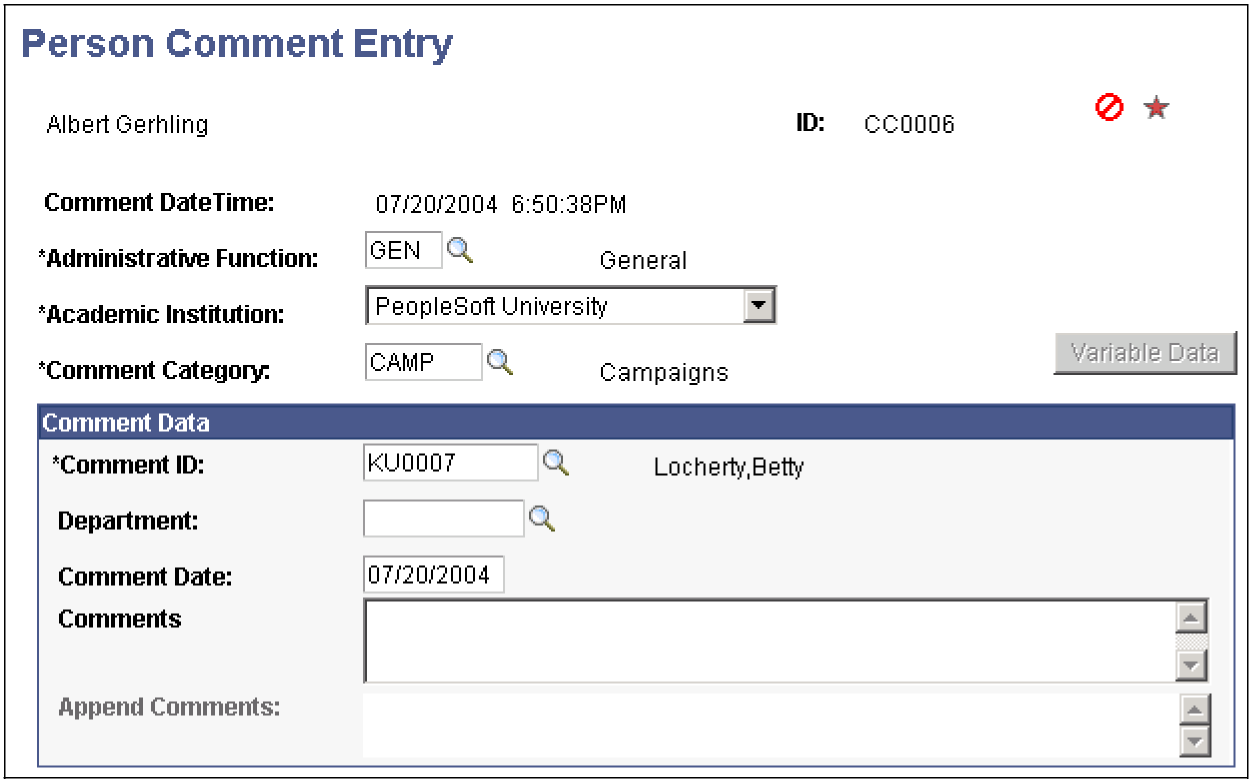
 (comments) Click to transfer to the Personal Comment Entry page or the Organizational Comments page, where you can enter a new comment for the individual or organization.

Pages Used to Enter Comments

Page Name	***Definition Name***	***Navigation***	***Usage***
Person Comment Entry	CMNT_ENTRY1	Campus Community, Comments, Comments - Person, Person Comment Entry	Enter comments about an individual.
Organization Comment Entry	ORG_CMNT_ENTRY1	Campus Community, Comments, Comments - Organization, Organization Comment Entry	Enter comments about an organization.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Person Comment Entry page or on the Organization Comment Entry page.	Review or change variable data for an individual or organization.

Entering Comments About an Individual

Access the Person Comment Entry page (Campus Community, Comments, Comments - Person, Person Comment Entry).



Person Comment Entry page

Administrative Function
The code for the administrative area with which this comment is associated.

Academic Institution
The academic institution with which this comment is associated.

Comment Category
The business need with which this comment is associated.

Variable Data
Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

Comment Data

Comment ID The system displays the ID of the person entering the comment. If someone else is responsible for this comment, you can override the default ID and type the responsible person's ID.

Department The department responsible for the comment.

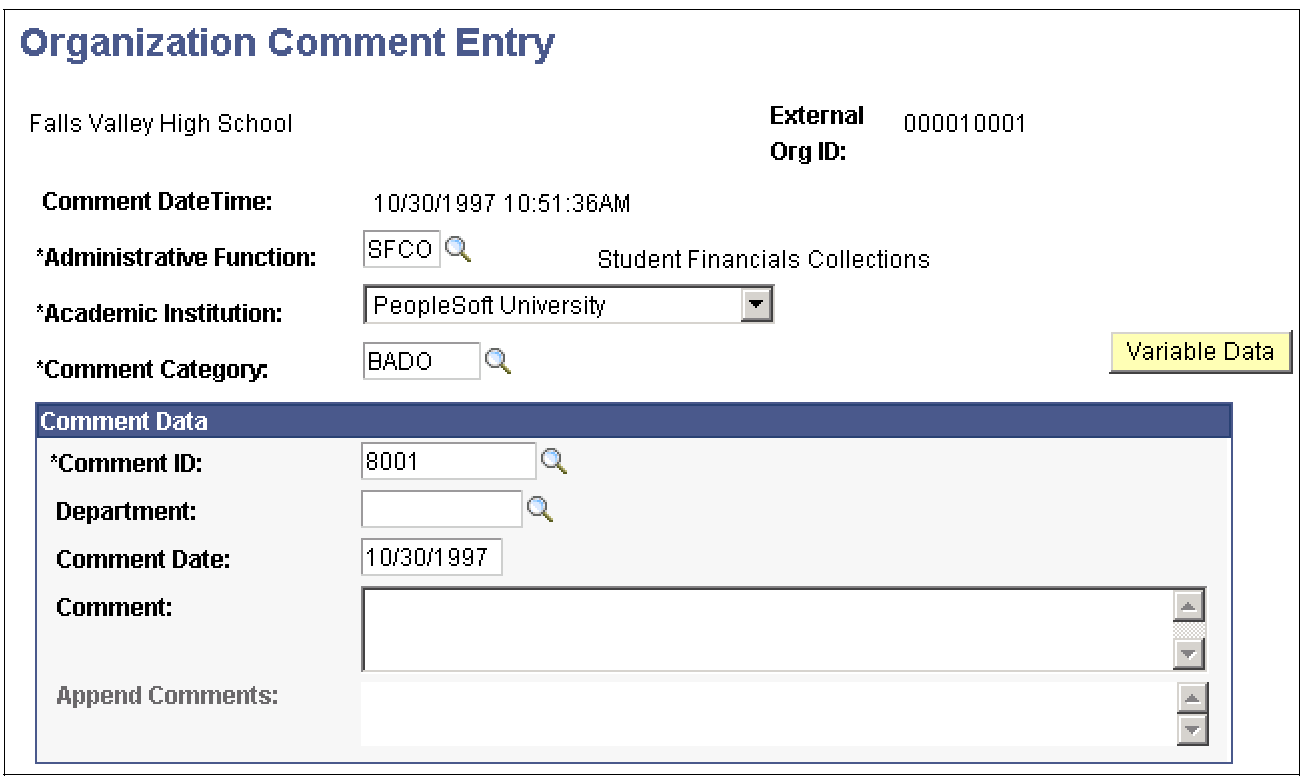
Comment Date The date when the comment is entered. The default date is the system's current date. You can override this date.

Comments The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes*, this field is editable.

Append Comments If the default comment is set to *Append*, this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments.

Entering Comments About an Organization

Access the Organization Comment Entry page (Campus Community, Comments, Comments - Organization, Organization Comment Entry).



Organization Comment Entry page

Administrative Function The administrative area with which this comment is most closely associated.

Academic Institution The academic institution with which this comment is most closely associated.

Comment Category The business need with which this comment is associated.

Variable Data Click to access the Variable Data page, where you can view or enter the variable data associated with the specified administrative function.

If you transferred to this page directly from a functional area, the variable data transferred from there.

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was transferred from the functional area.

Comment Data

Comment ID The system displays the ID of the person entering the comment. If someone else is responsible for the comment, you can override the ID and enter the responsible person's ID.

Department The department responsible for the comment.

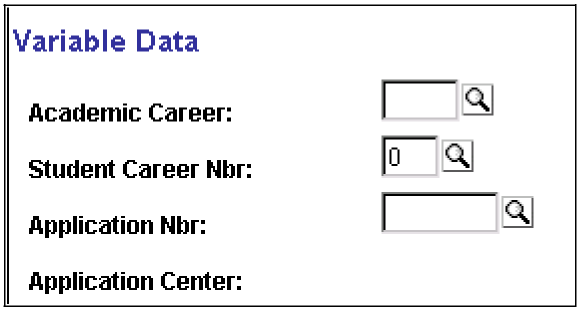
Comment Date The date when the comment is entered. The default date is the system's current date. You can override this date.

Comments The system displays the default comment, if any, from the Comment Categories page. If the default comment is set to *Allow Changes,* this field is editable.

Append Comments If the default comment is set to *Append,* this field is available. When the page is saved, comments entered in this field are appended to the end of the default comments.

Reviewing or Changing Variable Data

Access the Variable Data page (click the Variable Data button on the Person Comment Entry page or on the Organization Comment Entry page).



Variable Data page

Different fields and data appear on this page, based on the administrative function selected in the individual Person Comment Entry page or on the Organization Comment Entry page.

Reviewing Comments

This section lists common elements and discusses how to:

- Review a summary of comments about an individual.
- Review a summary of comments about an organization.
- Determine who is responsible for a comment.
- Review 3C group access to comments.

Note. Users can access only those comments to which they have been granted 3C group security. With 3C group inquiry access, users can view the comments but cannot change them. With 3C group update access, users can view and change the comments.

Common Elements Used in This Section

Edit or **View**

Click to access the Personal Comment Entry page or Organizational Comments page where, depending on your 3C group security level for the category, you can view or edit the comment about the individual or organization.

Edit is available for 3C group *update* access.

View is available for 3C group *inquiry* access.

Category

The code for the category with which the comment is associated.

Description

The description of the category with which the comment is associated.

Function

The code for the administrative area with which the comment is associated.

DateTime

The date and time when the comment was entered.

Sequence The number of the comment in the list of comments for the individual or organization.

Selection Criteria (area) If you click Search without entering any values, the system searches for all comments for the person ID or the organization ID and displays the results at the bottom of the page. Enter values or any combination of values *(Function, Category,* or *Comment ID)* to limit the search.

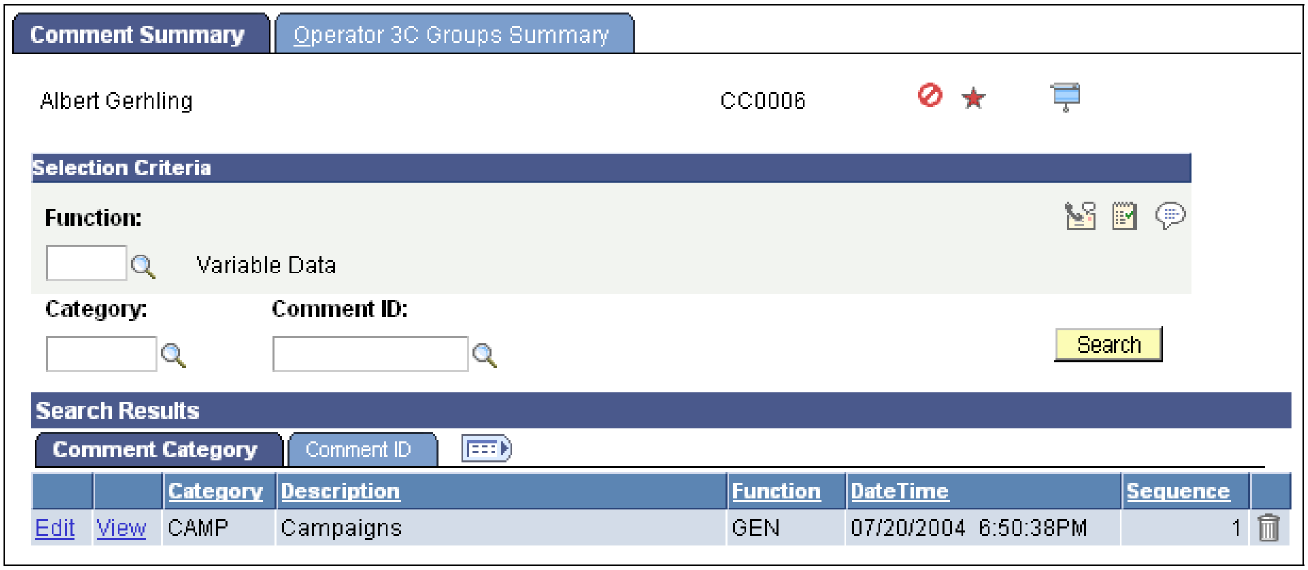
Comment ID (tab) Click to determine the ID and name of the person who is responsible for the comments.

Pages Used to View Comments

Page Name	*Definition Name*	*Navigation*	*Usage*
Comment Summary	CMNT_SUMMARY	Campus Community, Comments, Comments - Person, Person Comment Summary	View a summary of comments about an individual and delete comments.
Organization Comment Summary	ORG_CMNT_SUMMARY	Campus Community, Comments, Comments - Organization, Organization Comment Summary	View a summary of comments about an organization and delete comments.
Operator 3C Groups Summary	OPR_GRP_3C_SUM	• Campus Community, Comments, Comments - Person, Person Comment Summary, Operator 3C Groups Summary • Campus Community, Comments, Comments - Organization, Organization Comment Summary, Operator 3C Groups Summary	View or change an individual's 3C group inquiry or update access.
Person Comment Detail	CMNT_ENTRY1	Campus Community, Comments, Comments - Person, Person Comment Detail	View the details of a comment about an individual. (This is a view-only version of the Personal Comment Entry page.)
Organization Comment Detail	ORG_CMNT_ENTRY1	Campus Community, Comments, Comments - Organization, Organization Comment Detail	View the details of a comment about an organization. (This is a view-only version of the Organization Comment Entry page.)

Reviewing a Summary of Comments About an Individual

Access the Comment Summary page (Campus Community, Comments, Comments - Person, Person Comment Summary).

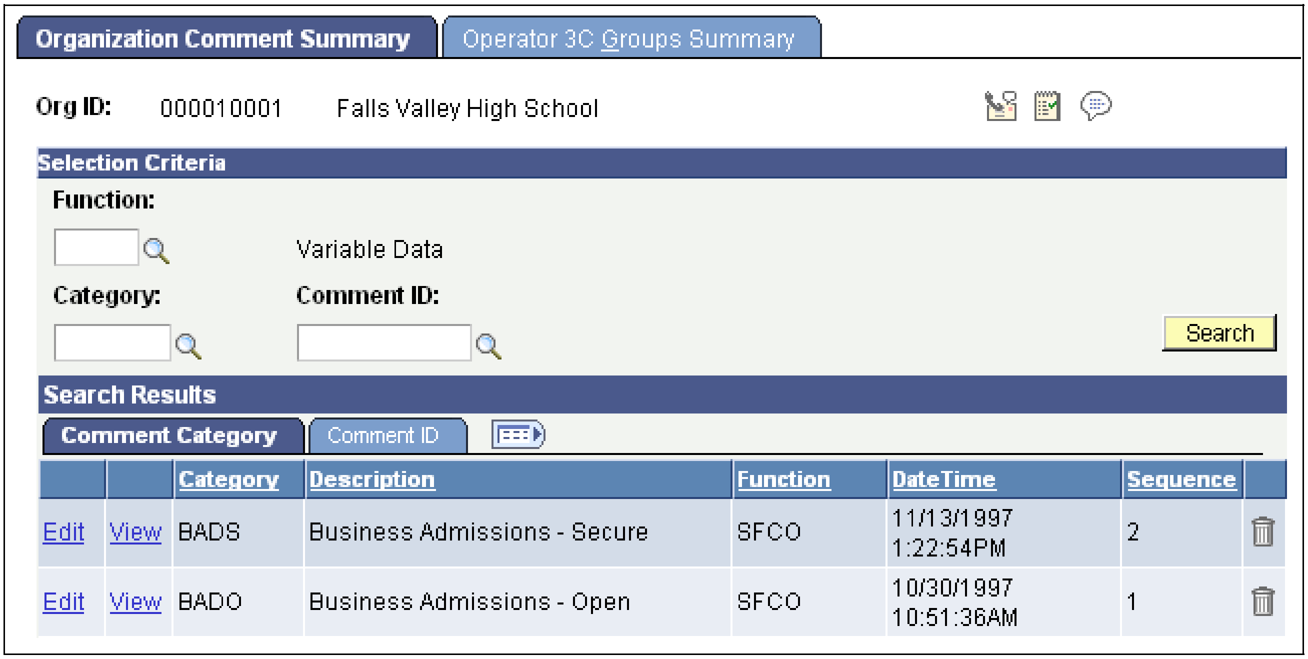


Comment Summary page: Comment Category tab

To delete a comment, click the trash can icon beside the row. Activate this icon using the Allow Deletes from 3C Pages group box on the Campus Community Installation page.

Reviewing a Summary of Comments About an Organization

Access the Organization Comment Summary page (Campus Community, Comments, Comments - Organization, Organization Comment Summary).

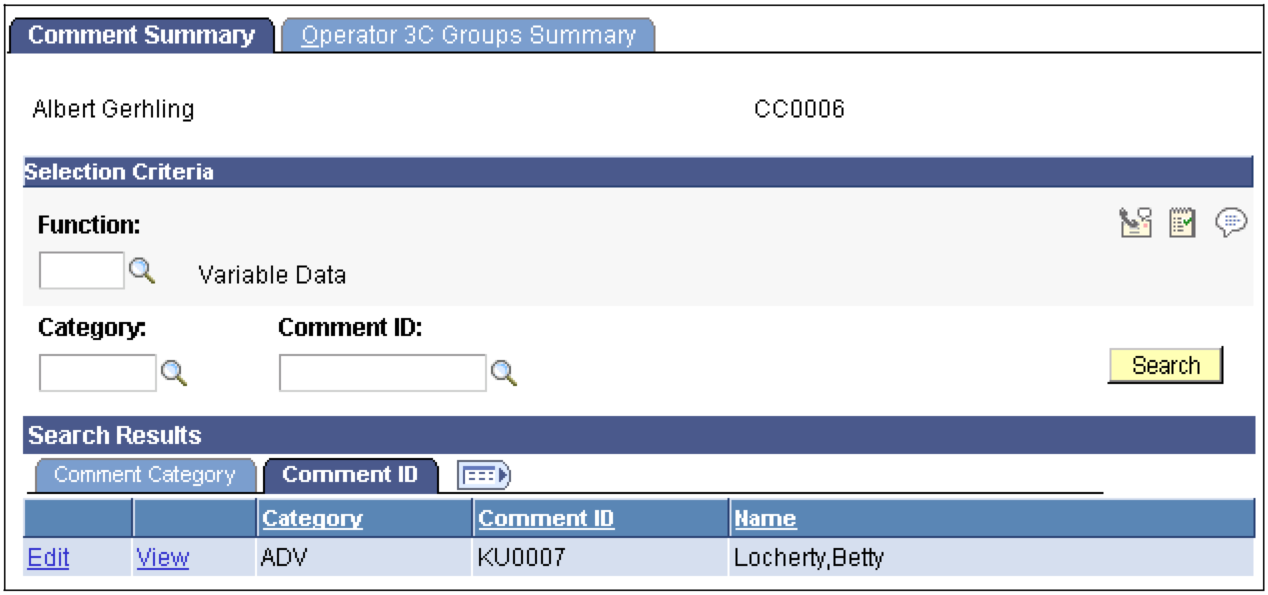


Organization Comment Summary page

To delete a comment, click the trash can icon beside the row. Activate this icon using the Allow Deletes from 3C Pages group box on the Campus Community Installation page.

Determining Who Is Responsible for a Comment

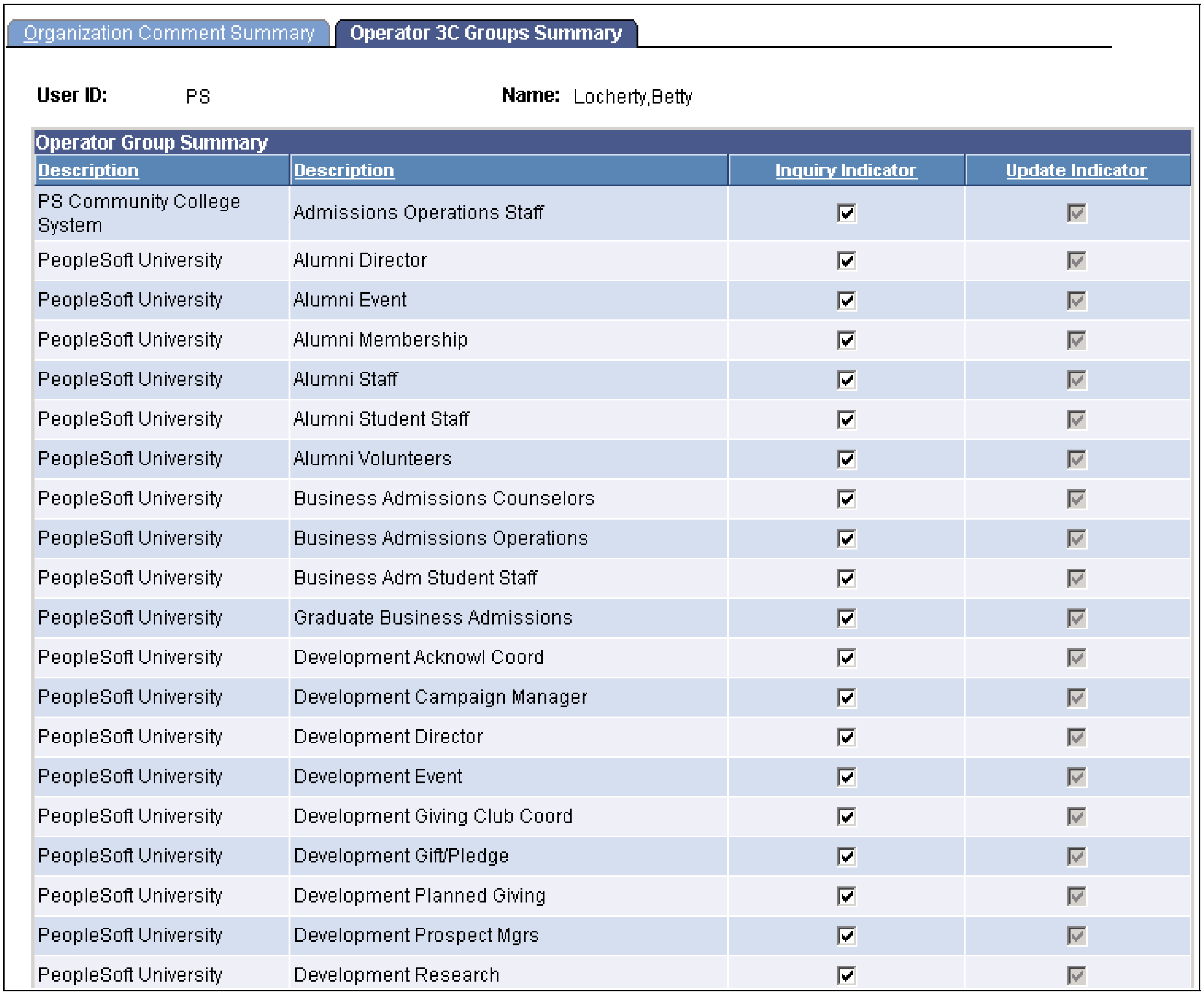
Access the Comment ID tab area on the appropriate summary page (Comment Summary page or Organization Comment Summary page).



Comment Summary page: Comment ID tab

Reviewing 3C Group Access to Comments

Access the Operator 3C Groups Summary page (Campus Community, Comments, Comments - Person, Person Comment Summary, Operator 3C Groups Summary or Campus Community, Comments, Comments - Organization, Organization Comment Summary, Operator 3C Groups Summary).


Organization Comment Summary | Operator 3C Groups Summary

User ID: PS Name: Locherty,Betty

Operator Group Summary

Description	Description	Inquiry Indicator	Update Indicator
PS Community College System	Admissions Operations Staff	☑	☑
PeopleSoft University	Alumni Director	☑	☑
PeopleSoft University	Alumni Event	☑	☑
PeopleSoft University	Alumni Membership	☑	☑
PeopleSoft University	Alumni Staff	☑	☑
PeopleSoft University	Alumni Student Staff	☑	☑
PeopleSoft University	Alumni Volunteers	☑	☑
PeopleSoft University	Business Admissions Counselors	☑	☑
PeopleSoft University	Business Admissions Operations	☑	☑
PeopleSoft University	Business Adm Student Staff	☑	☑
PeopleSoft University	Graduate Business Admissions	☑	☑
PeopleSoft University	Development Acknowl Coord	☑	☑
PeopleSoft University	Development Campaign Manager	☑	☑
PeopleSoft University	Development Director	☑	☑
PeopleSoft University	Development Event	☑	☑
PeopleSoft University	Development Giving Club Coord	☑	☑
PeopleSoft University	Development Gift/Pledge	☑	☑
PeopleSoft University	Development Planned Giving	☑	☑
PeopleSoft University	Development Prospect Mgrs	☑	☑
PeopleSoft University	Development Research	☑	☑

Operator 3C Groups Summary page

Deleting Comments

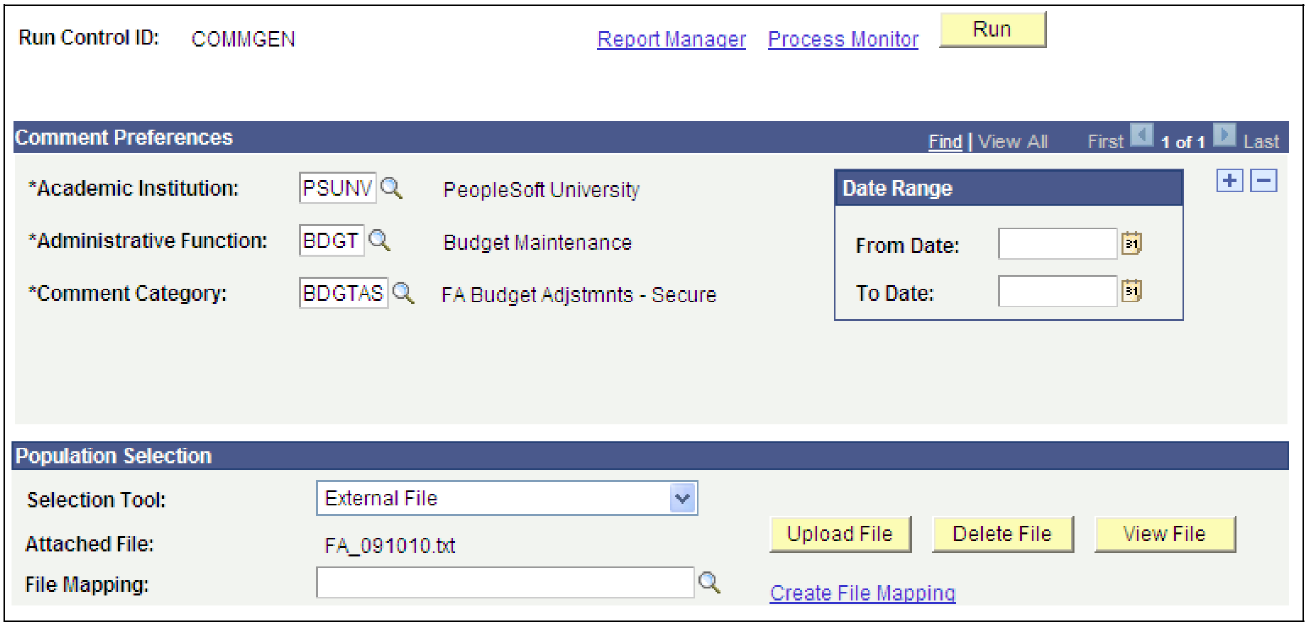
This section discusses how to delete comments in batch.

Page Used to Delete Comments

Page Name	*Definition Name*	*Navigation*	*Usage*
Delete Comments	SCC_DEL_CMNT	Campus Community, Comments, Delete Comments	Define processing parameters to run the Delete Comments process.

Deleting Comments in Batch

Access the Delete Comments page.



Delete Comments page

Select one or more parameters to narrow the set of comments to be deleted. The Academic Institution, Administrative Function, and Comment Category fields are required; all other parameter selections are optional. To define a subset of specific IDs for which you want to delete communications, use the Population Selection group box. If you specify a Date Range, the comment deletion process compares the value of the Comment Date field of each comment against this range.

Administrative Function — Select an administrative function. The values available here are defined on the Administrative Function Table.

Comment Category — Select a category of comments. The values available here are restricted by 3C group security.

From Date and **To Date** — These fields are optional; however if used, both date fields must be completed and the From Date value must precede the To Date value.

Use the Population Selection group box to define a set of IDs, select a PS Query or define an external file. Queries available for selection have the 3C Delete Bind Record "SCC_3CDELCT_BND" included in the query. IDs returned by the Population Selection process apply to all Checklist Preference rows in the component.

After you specify the parameters, click the Run button to run the SCC_3CD_CMNT Application Engine process. When you click the Run button, the system searches for all checklists matching the parameters specified on this page and deletes them. Only the target checklist items are deleted and any related communications and comments remain, while maintaining the relationships between the relevant 3C tables.

Chapter 50

Managing Checklists

This chapter provides an overview of checklists, lists prerequisites and common elements, and discusses how to:

- Assign checklists to individuals.
- Assign checklists to organizations.
- Assign checklists to events.
- Review 3C group access to checklists.
- Review checklists for individuals.
- Review checklists for organizations.
- Review checklists for events.
- Delete checklists.

Understanding Checklists

Use checklists to assign lists of requirements to individuals, organizations, events, or groups of individuals and to monitor progress toward completing those requirements. You can use checklists to track applications, organize recruitment mailings, assign tasks to staff members, generate a series of communication items, and so on.

You can assign checklists to an organization. For example, you might want to assign a checklist of recruitment items required from a specific high school, including a roster of the top 10 percent of the current graduating class, a list of athletic award winners, and scholarship applicants.

You can assign checklists to events. For example, if you are presenting a conference, you might want to create a checklist of things to do, including sending out invitations, booking a keynote speaker, setting food menus, and so on.

For each checklist item that you assign, you can specify the individual who is responsible for that item and the due date. If the item is also associated with an organization, you can specify the name of the organization responsible for the item. You can also specify an ultimate due date for the overall checklist.

You can assign checklists to individuals, organizations, and events manually, or you can use the 3C engine to automatically assign checklists to individuals or organizations based on rules and conditions that you define.

(checklists)	After a checklist is set up, you can, with appropriate security access, click the Create Checklists button on a page in a functional area about that individual or organization to view or update their checklists.

You can also navigate through the menus, as described in this section, to access the checklist management pages.

You can update the status of checklist items manually on the same checklist management pages where you assign the items, or you can view a summary of all checklist items assigned to an individual, organization, or event and manually update each checklist item status there.

You can update a specific checklist item for the IDs that you indicate. For example, when a recruiter makes phone calls to several prospects, he or she could select the Recruiter Phone Call checklist item to update and enter the ID of each individual who was called. When the page is saved, the system updates the status of the Recruiter Phone Call checklist item for each of the specified individuals.

You can use automated processes to update checklists, too. You can specify criteria to run either the Update - Automated process or the Update Checklists - by Item process to update checklists in the background.

Run the Item Update - Automated is a background process that updates the status of either a specific checklist item or all checklist items in three general areas (transcripts, general materials, and test scores) across the IDs that you specify. The process updates the checklists in the background and, once set up, does not require manual intervention. It automatically checks the status indicator for all items in each area that you select and, upon encountering a status of *Complete* for an item, updates the status of the relevant checklist.

You can use the 3C engine to automatically update checklist items either in the background or in real time, based on rules and events that you define.

Note. The 3C engine cannot update items that include organization and name IDs. You must update checklists for transcripts, test scores, and general material items either manually or by using the Item Update - Automated process.

You can review checklist information several ways. You can review checklist information for an individual, organization, or event; or you can review checklist information by tracking group for an individual or for an organization. You can review detailed checklist data for an organization, or you can search for a summary of the checklist data that you want to review for an organization. You can also review organization checklists by the tracking groups to which their checklist items are assigned.

Note. PeopleSoft Campus Self Service, which is licensed separately, offers self-service checklist functionality.

Prerequisites

Before you can assign and monitor checklists, you must set up checklist item codes and checklist templates. To use the full functionality of checklist management, you should also be familiar with administrative functions and 3C group security, and ensure that they are properly set up.

Common Elements Used in This Chapter

(communications)

Click to transfer to where you can add a new communication for the individual or organization.

(checklists)

Click to transfer to where you can add a new checklist for the individual or organization.

(comments)

Click to transfer to where you can enter a new comment for the individual or organization.

View or **Edit**

Click to transfer to where you can view or edit the communication assignment.

Note. The View link is available when the user has 3C group *inquiry* access for the communication category. The Edit link is available only when the user has 3C group *update* access for the communication category.

Assigning Checklists to Individuals

This section discusses how to:

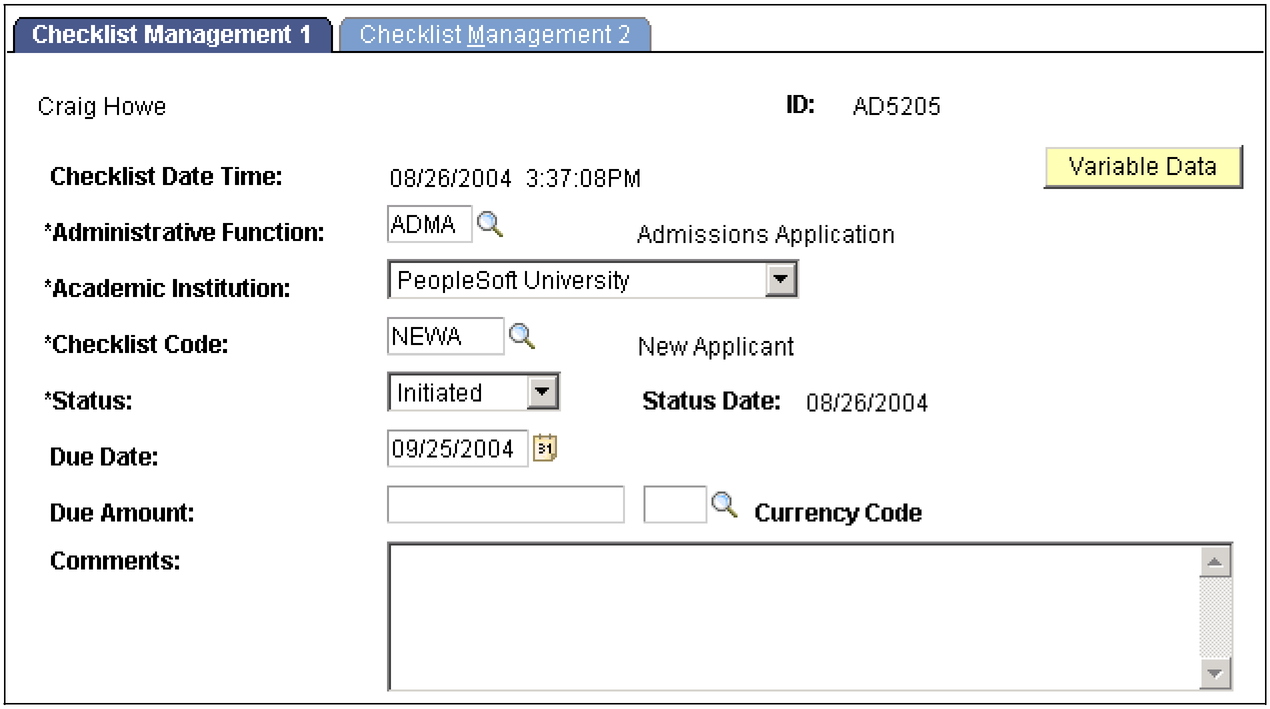
- Assign a checklist to an individual.
- Review or update variable data for an individual.
- Assign checklist items to an individual's checklist.

Pages Used to Assign Checklists to Individuals

Page Name	***Definition Name***	***Navigation***	***Usage***
Checklist Management 1	PERS_CHKLST_MGMT1	Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 1	Assign a checklist to an individual.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Checklist Management 1 page.	Review or edit variable data for an individual.
Checklist Management 2	PERS_CHKLST_MGMT2	Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 2	Place checklist items on an individual's checklist and identify who is responsible for each item.

Assigning a Checklist to an Individual

Access the Checklist Management 1 page (Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 1).



Checklist Management 1 page

Administrative Function

The code for the functional area with which this individual is associated.

The available administrative function codes are from the Administrative Functions page.

If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code

The code that describes the checklist assigned to this individual.

The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.

Status and **Stat Dt** (status date)

The system displays the status and the date when the status was updated. Valid status values are *Initiated* or *Completed.*

Due Date

The date by which the entire checklist must be completed for this individual.

Due Amount

The monetary amount, if any, that is due as part of this checklist and the currency in which it is expressed.

Comments

Enter comments to further identify or describe the checklist for this individual.

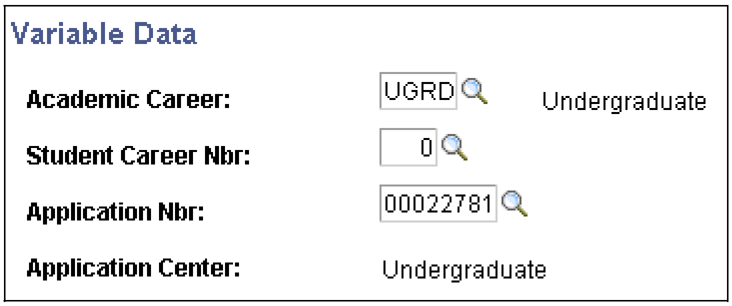
Variable Data

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

If variable data is required, the Variable Data button is available. Select the variable data (for example, Aid Year) for which the checklist is applicable.

Reviewing or Updating Variable Data for an Individual

Access the Variable Data page (click the Variable Data button on the Checklist Management 1 page).

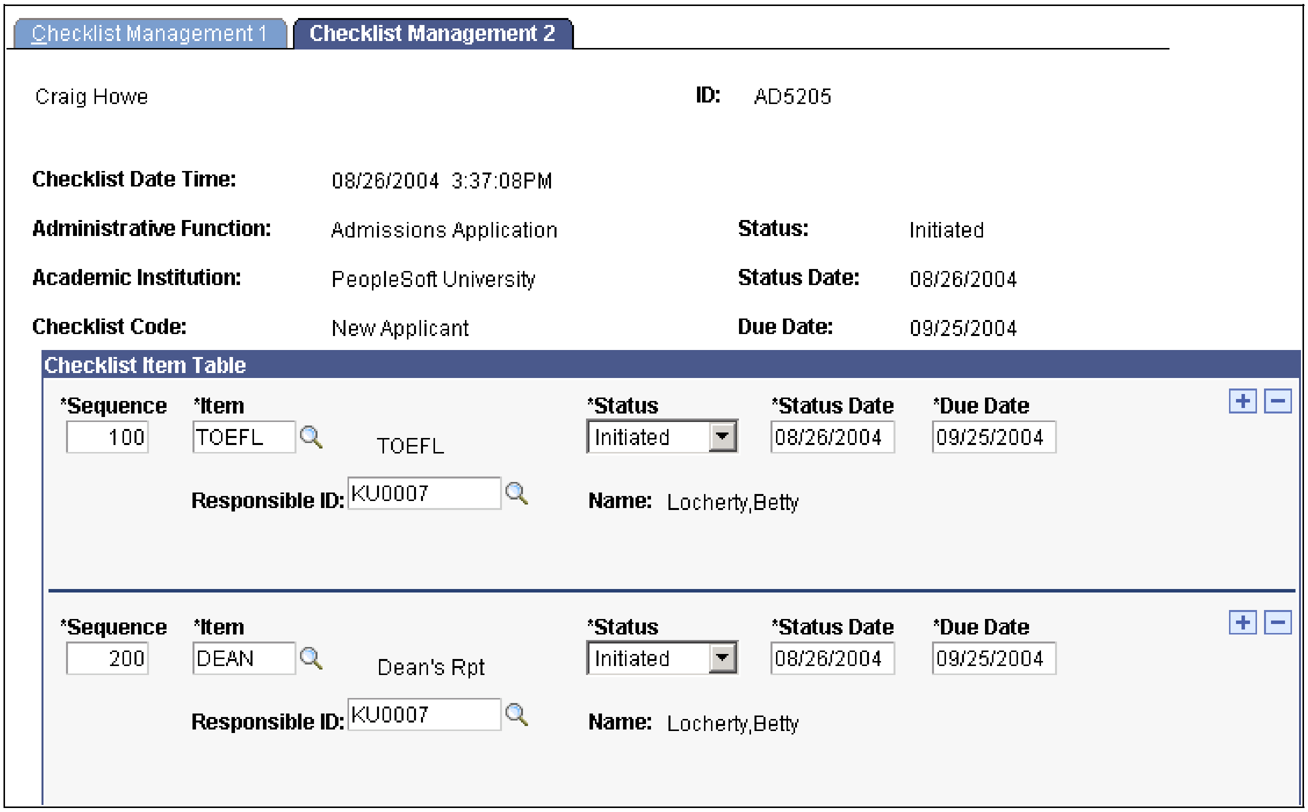


Variable Data page (individual)

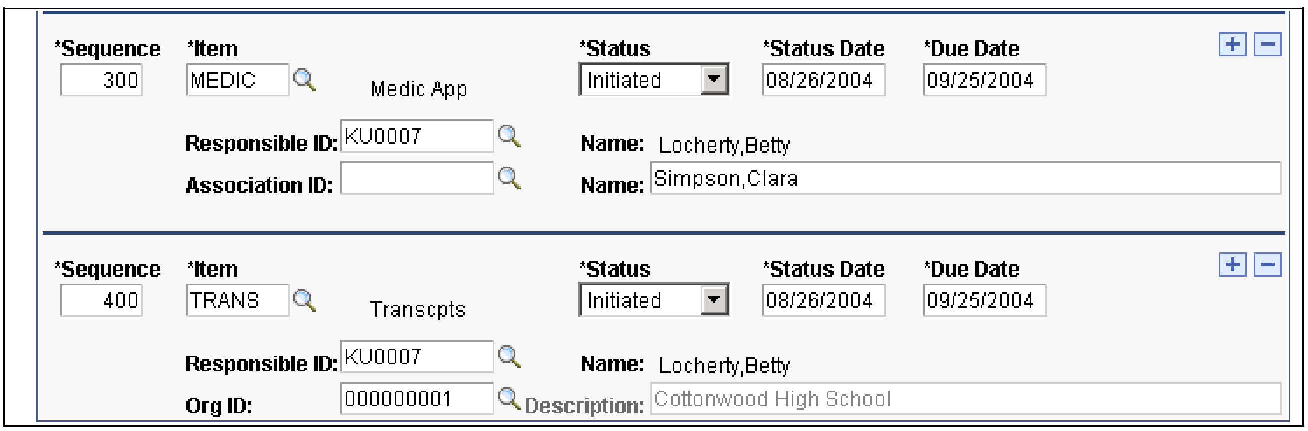
Different fields and data appear on this page based on the individual and the administrative function selected on the Checklist Management 1 page.

Assigning Checklist Items to an Individual's Checklist

Access the Checklist Management 2 page (Campus Community, Checklists, Person Checklists, Checklist Management - Person, Checklist Management 2).



Checklist Management 2 page (1 of 2)



Checklist Management 2 page (2 of 2)

Note. The checklist items associated with the specified checklist code on the Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Checklist Items

Sequence	The number of this checklist item in the list of checklist items for this individual. The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.
Item	The code for this checklist item. The available item codes are from the Checklist Item Functions page for the administrative function selected.
Status and **Status Date**	The status and status date of the checklist item: *Initiated, Completed, Active, Ordered, Paid Off, Received, Notified, 2nd Notification, Returned, Waived,* or *Cancelled.* Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Due Date	The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.
Responsible ID and **Name**	The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database. The system displays the name of the individual with that ID.
Association ID and **Name**	If the checklist item was created with an item association of *Name* on the Checklist Items page, the Association ID field appears for you to identify the associated person. For example, the checklist item might be a medical appointment, and that appointment might be with Dr. Clara Simpson. Dr. Simpson is the associated person. If the associated person has an ID in your database, enter it here. When you exit the field, the system displays the name of that individual. If the individual does not have an ID in your database, enter his or her name manually.
Org ID (organization ID) and **Description**	If the checklist item was created with an item association of *Organization* on the Checklist Items page, the Org ID field appears for you to identify the associated organization. For example, the checklist item might be a transcript, and a transcript is required from Cottonwood High School. Cottonwood High is the associated organization. If the associated organization has an ID in your database, enter it here. When you exit the field, the system displays the name of that organization. If the organization does not have an ID in your database, enter the name manually.

Assigning Checklists to Organizations

This section discusses how to:

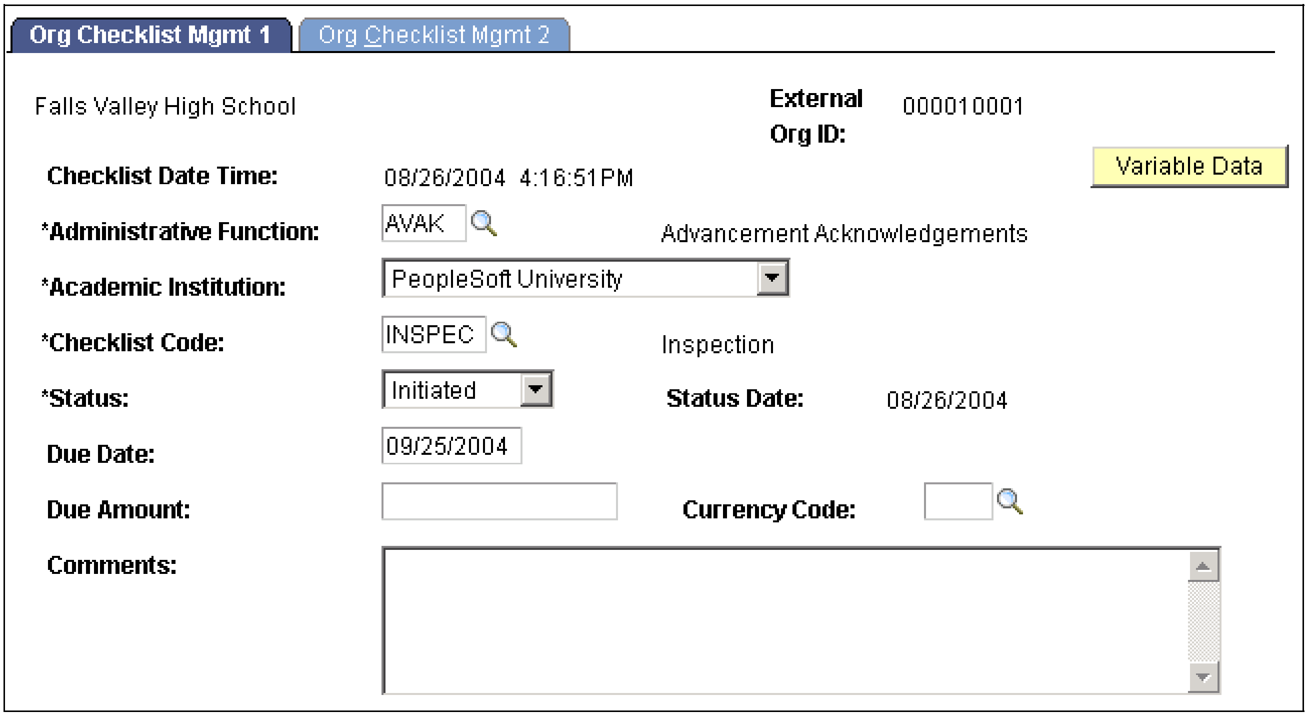
- Assign a checklist to an organization.
- Review or update variable data for an organization.
- Assign checklist items to an organization's checklist.

Pages Used to Assign Checklists to Organizations

Page Name	***Definition Name***	***Navigation***	***Usage***
Org Checklist Mgmt 1	ORG_CHKLST_MGMT1	Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 1	Assign a checklist to an organization.
Variable Data	VAR_XXXX_SEC (where XXXX is the administrative code)	Click the Variable Data button on the Organization Checklist Management 1 page.	Enter or review variable data for an organization.
Org Checklist Mgmt 2	ORG_CHKLST_MGMT2	Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 2	Place checklist items on an organization's checklist and identify who is responsible for each item.

Assigning a Checklist to an Organization

Access the Org Checklist Mgmt 1 page (Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 1).



Org Checklist Mgmt 1 (organization checklist management) page

Administrative Function

The code for the functional area with which this organization is associated.

The available administrative function codes are from the Administrative Functions page.

If you accessed this page from another page, the system automatically displays the administrative function from that page.

Checklist Code

The code that describes the checklist assigned to this organization.

The only checklist codes available are those associated with administrative function on the Checklist Item Functions page.

Status and**Status Date**

The status and status date of the checklist item. Valid status values are *Initiated* or *Completed.*

Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Due Date

The date by which the entire checklist must be completed for this organization.

Due Amount and **Currency Code**

The monetary amount, if any, that is due as part of this checklist, and the currency in which it is expressed.

Comments

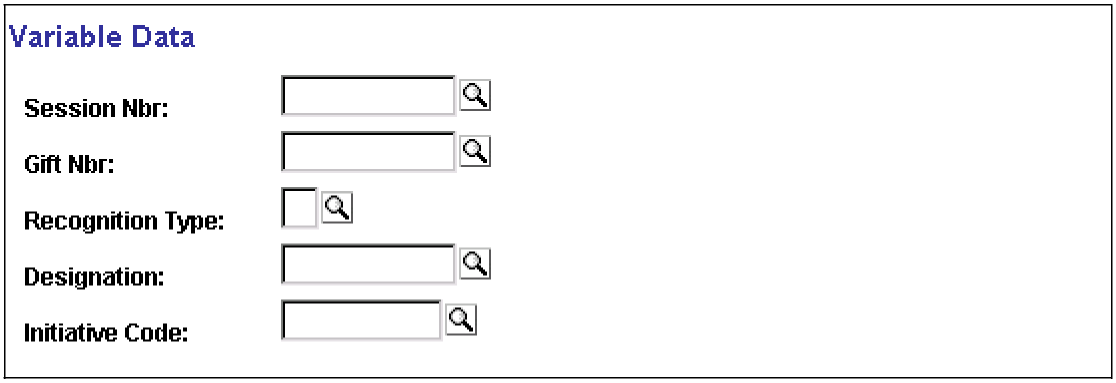
Enter comments to further identify or describe the checklist for this organization.

Variable Data

If no variable data is required or allowed for the administrative function, the Variable Data button is unavailable and no data was available to transfer.

Reviewing or Updating Variable Data for an Organization

Access the Variable Data page (click the Variable Data button on the Organization Checklist Management 1 page).

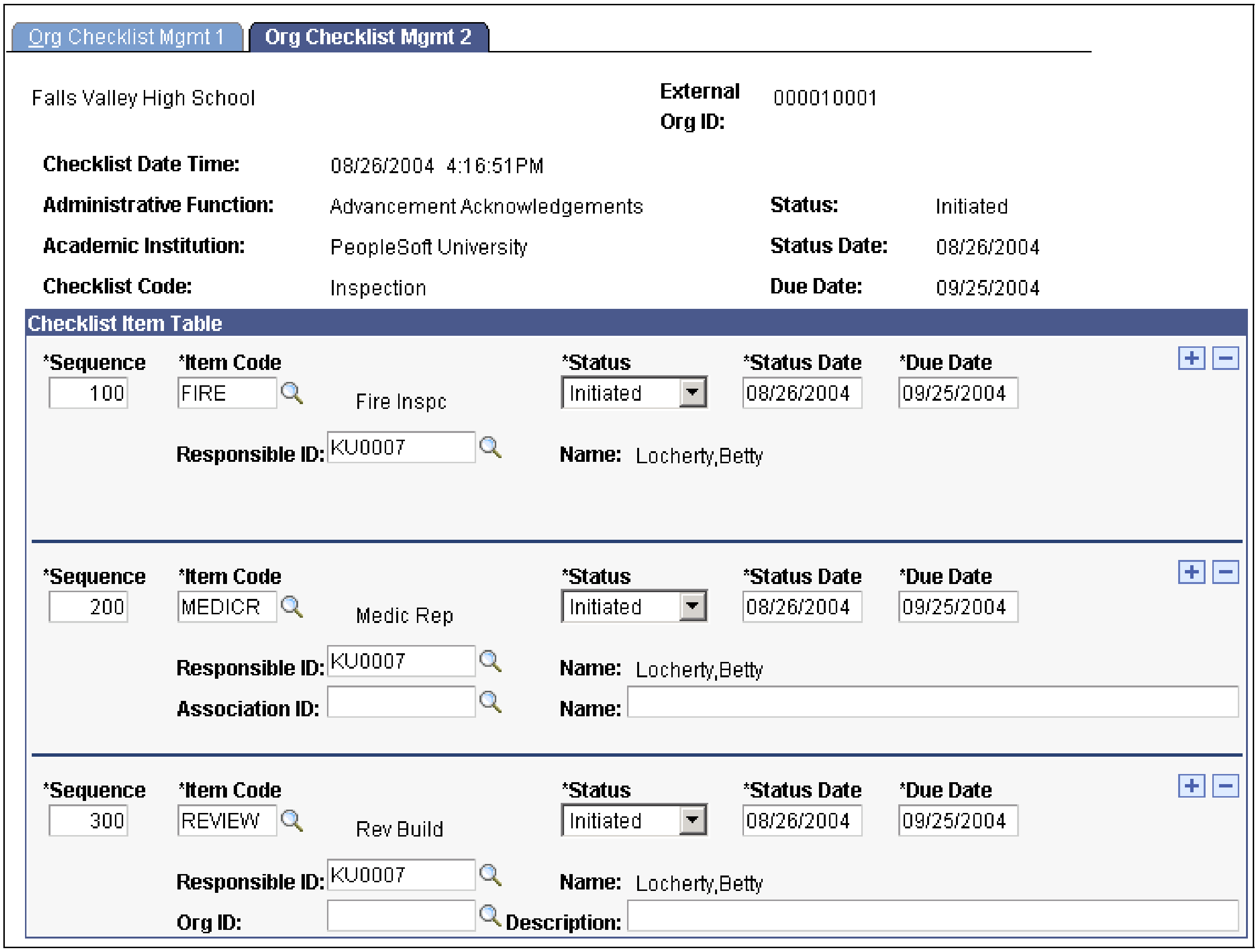


Variable Data page (organization)

Different fields and data appear on this page, based on the individual and the administrative function selected on the Organization Checklist Management 1 page.

Assigning a Checklist Item to an Organization's Checklist

Access the Org Checklist Mgmt 2 page (Campus Community, Checklists, Organization Checklists, Checklist Management - Org, Org Checklist Mgmt 2).



Org Checklist Mgmt 2 (organization checklist management) page

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Note. The checklist items associated with the specified checklist code on the Org Checklist Mgmt 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Checklist Items

Sequence

The number of this checklist item in the list of checklist items for this organization.

The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.

Item Code

The code for this checklist item. The available item codes are from the Checklist Item Functions page for the administrative function selected.

Status and **Status Date**	The status and status date of the checklist item: *Initiated, In Progress,* or *Completed.* Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Due Date	The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.
Responsible ID	The default ID is that of the user who created the checklist on the Checklists page. You can manually override the ID to reassign responsibility to someone else in your database.
Association ID and **Name**	If the checklist item was created with an item association of *Name* on the Checklist Items page, the Association ID field appears for you to identify the associated person. For example, the checklist item might be a medical appointment, and that appointment might be with Dr. Clara Simpson. Dr. Simpson is the associated person. If the associated person has an ID in your database, enter it here. When you exit the field, the system displays the name of that individual. If the individual does not have an ID in your database, enter his or her name manually.
Org ID (organization ID) and **Description**	If the checklist item was created with an item association of *Organization* on the Checklist Items page, the Org ID field appears for you to identify the associated organization. For example, the checklist item might be a transcript, and a transcript is required from Cottonwood High School. Cottonwood High is the associated organization. If the associated organization has an ID in your database, enter it here. When you exit the field, the system displays the name of that organization. If the organization does not have an ID in your database, enter the name manually.

Assigning Checklists to Events

This section discusses how to:

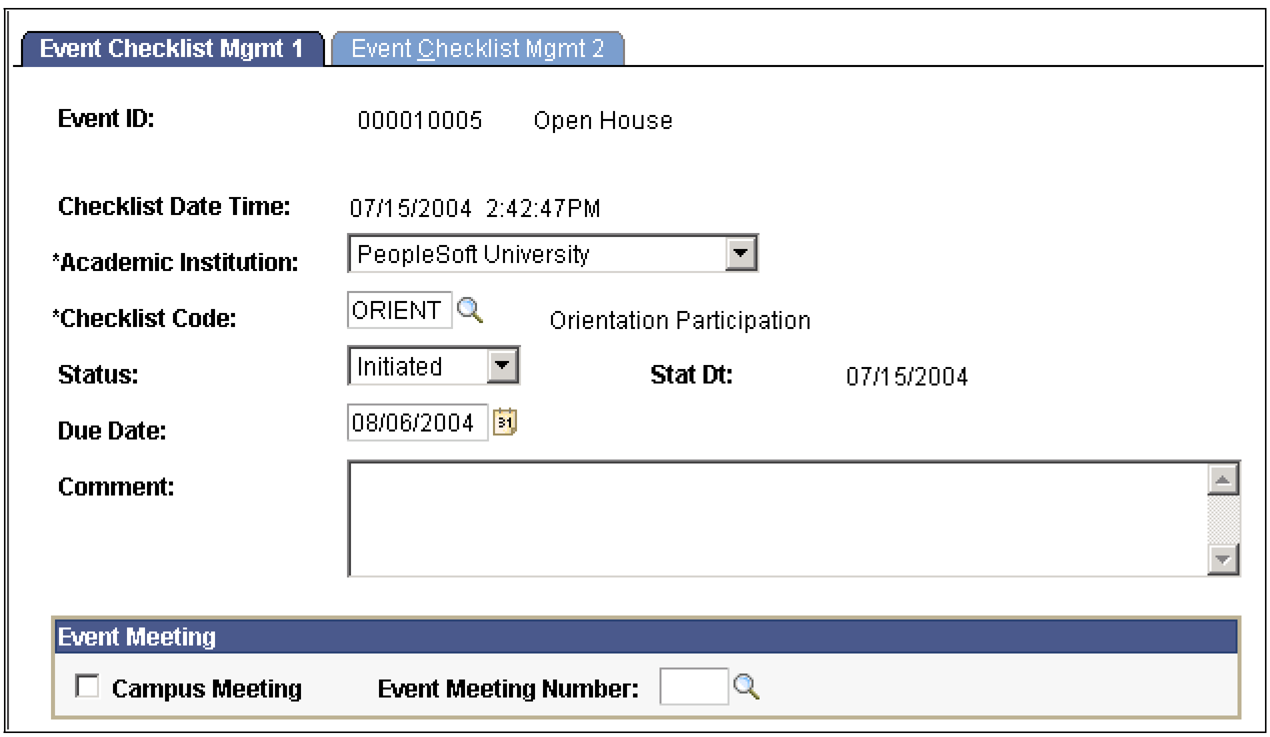
- Assign checklist items to an event's checklist.
- Assign a checklist to an event.

Pages Used to Assign Checklists to Events

Page Name	***Definition Name***	***Navigation***	***Usage***
Event Checklist Mgmt 1	EVENT_CHKLST_MGMT1	Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 1	Specify checklist items for an event by selecting the meetings that make up the event.
Event Checklist Mgmt 2	EVENT_CHKLST_MGMT2	Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 2	Assign a checklist to an event.

Assigning a Checklist Item to an Event's Checklist

Access the Event Checklist Mgmt 1 page (Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 1).



Event Checklist Mgmt (management) 1 page

Academic Institution

The academic institution with which this event is associated.

The available academic institutions are from the Institution Table page.

Checklist Code

The code that describes the checklist assigned to this organization.

The only checklist codes available are those associated with the EVNT (Event) administrative function on the Checklist Item Functions page.

Status and **Status Date**

The status and status date of the checklist item: *Initiated,* or *Completed.*

Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Due Date

The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.

Comment

Enter comments to further identify or describe the checklist for this organization.

Event Meeting

Enter event variable data in this section. This data is similar to variable data for individuals and organizations; however, the EVNT (Event) administrative function is the only applicable function for events.

Campus Meeting

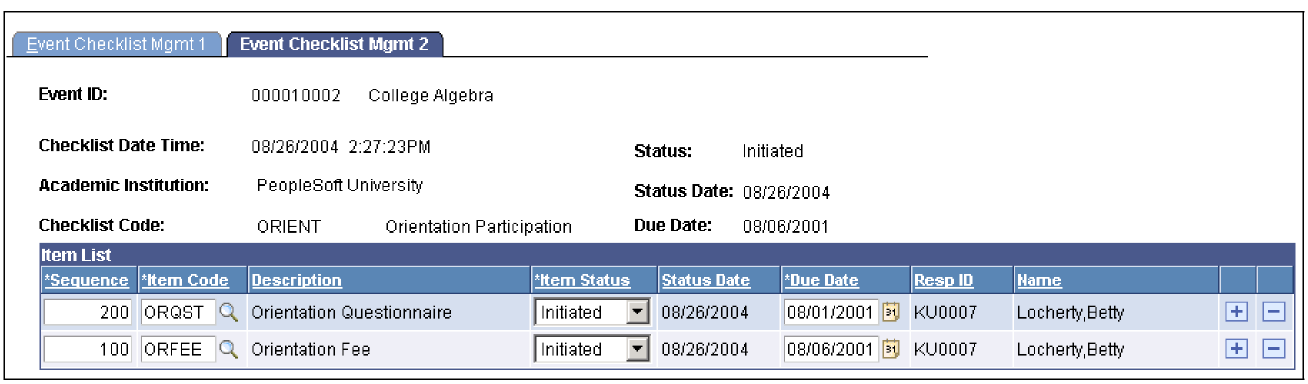
When selected, indicates that this checklist is for a specific meeting assigned to this event.

Event Meeting Number

The number of the specific meeting to which this checklist is assigned. The available numbers are from the Meetings Details page for this event.

Assigning a Checklist to an Event

Access the Event Checklist Mgmt 2 page (Campus Community, Checklists, Event Checklists, Checklist Management - Event, Event Checklist Mgmt 2).



Event Checklist Mgmt (management) 2 page

Note. The checklist items associated with the specified checklist code on the Event Checklist Management 1 page become available when you select the checklist code. You can enter any of those items directly, or you can click the Lookup button to go to the search page, where all checklist items associated with the specified administrative function are available.

Item List

Sequence	The number of this checklist item in the list of checklist items for this organization. The system automatically enters the next sequential number for each checklist item that you add. You can override the number manually to reorder the list of items for this checklist.
Item Code	The code for this checklist item. The item codes available are from the Checklist Item Functions page for the administrative function selected.
Item Status and **Status Date**	The status and status date of the checklist item: *2nd Ntfctn, Active, Cancelled, Completed, Initiated, Notified, Ordered, Paid Off, Received, Returned,* or *Waived.* Values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Due Date	The system displays the overall checklist due date as the default due date for each checklist item. You can override this date, but it must be with an *earlier* date so that the item due date does not exceed the overall due date of the checklist.
Resp ID (responsible ID) and **Name**	The system displays the ID and name of the user who created the checklist on the Checklists page.

Reviewing 3C Group Access to Checklists

You can access the 3C Group Summary page to view or change an individual's 3C group security access to checklists.

Note. Users can access only those checklists to which they are granted 3C group security. With 3C group inquiry access, users can view the checklists, but cannot change them. With 3C group update access, users can view and change the checklists.

Updating Checklist Item Status

You can change the status of a checklist item for an individual or organization in the respective Checklist Management component.

To minimize security access concerns or to accelerate data entry, you can update the status of a checklist item for individual IDs (not for organization IDs) manually inside a component that shows only checklist items, or you can change the same item across all IDs automatically using the Update Checklist Item - by Item (CCCHKLER.SQR) process.

To update a checklist item manually by ID, access the checklist assigned to that ID and change the status of each item to the appropriate status in that checklist.

To use the Update Checklist Item - by Item process, select the item whose status you want to change and add all the IDs for which you want the process to update the status. For example, if you have several recruiter phone calls to make, as you call you could insert all the individual IDs under the checklist item Call Prospect. When you run the process, the system updates the checklist item status to *Complete* for all the IDs that you listed.

Using the automated process (CCITMUPD SQR), you can also update checklist items automatically across checklists using test scores, transcripts, or general materials.

This section discusses how to:

- Manually update checklist items by ID.
- Update all or a specific checklist item by automated process.
- Update test score, transcript, and general material checklist items.

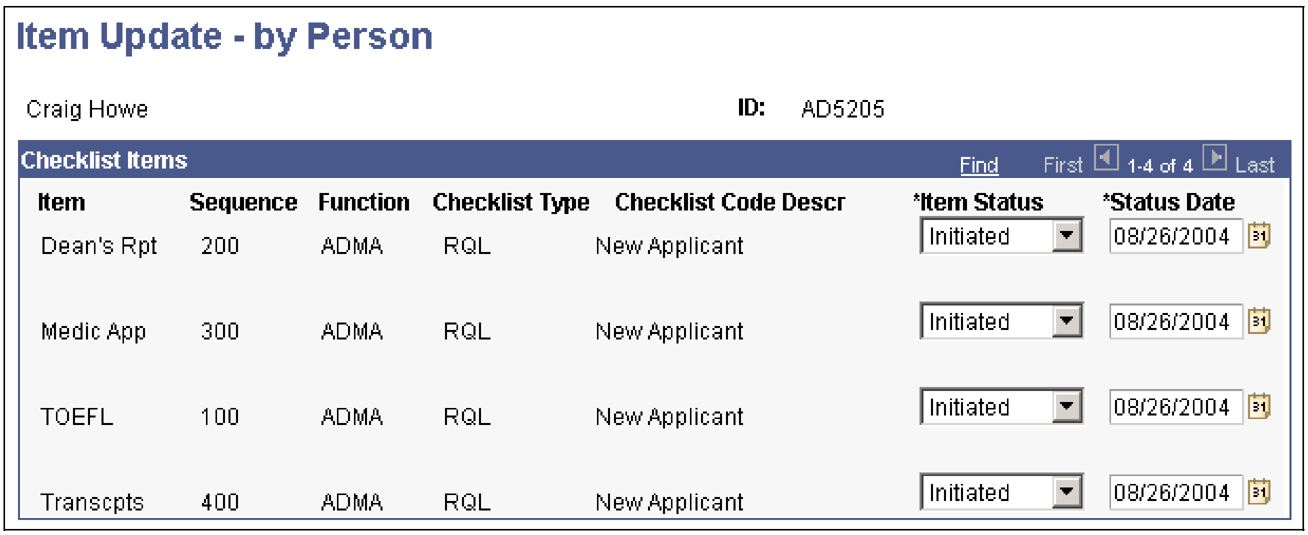
Pages Used to Update Checklist Item Status

Page Name	***Definition Name***	***Navigation***	***Usage***
Item Update - by Person	PERS_CHKLST_UPDATE	Campus Community, Checklists, Person Checklists, Item Update - by Person	Manually update the status of each relevant checklist item on a summary of checklist items for a specific ID (individual IDs only).
Item Update - by Item	CHKLST_ITEM_UPDATE	Campus Community, Checklists, Process Checklists, Item Update - by Item	List all the individual IDs for whom you want to change the status of a specific checklist item to *Complete* when the update process (CCCHKLER SQR) runs in the background.
Update Checklist Item - by Item	RUNCTL_CCCHKLER	Campus Community, Checklists, Process Checklists, Update Checklist Item Update - by Item	Run the automated Update Checklist Item - by Item process (CCCHKLER SQR) to update one or all checklist items for IDs to which the items are assigned.

Page Name	***Definition Name***	***Navigation***	***Usage***
Checklist Item Update Parms	RUNCTL_ITMUPD	Campus Community, Checklists, Process Checklists, Item Update - Automated, Checklist Item Update Parms	Specify the test scores, transcripts, or general materials checklist items and IDs to update when running the Checklist Item Update process for test scores, transcripts, or general materials.
Data Selection Parms	RUNCTL_ITMUPD_DATA	Campus Community, Checklists, Process Checklists, Item Update - Automated, Data Selection Parms	Specify the IDs and materials to update when running the Checklist Item Update process for test scores, transcripts, or general materials.

Manually Updating Checklist Items by ID

Access the Item Update - by Person page (Campus Community, Checklists, Person Checklists, Item Update - by Person).



Item Update - by Person page

Item, Sequence, Function, Checklist Type and **Checklist Code Descr** (checklist code description)	The system displays this information for each of the checklists items assigned to the individual on the Checklist Management 1 page.

Item Status

Enter the updated status of the checklist item: *Initiated, In Progress, Completed,* and so on.

Values for this field are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Status Date

When you update the status of a checklist item, the system automatically changes the status date to the system's current date. You can override this date.

Updating All or a Specific Checklist Item by Automated Process

Access the Update Checklist Item - by Item page (Campus Community, Checklists, Process Checklists, Update Checklist Item Update - by Item).

Update Checklist Item - by Item page

Item Selection

All Items

Select this to update all of the checklist items specified on the Item Update - by Item table to a status of *Complete.*

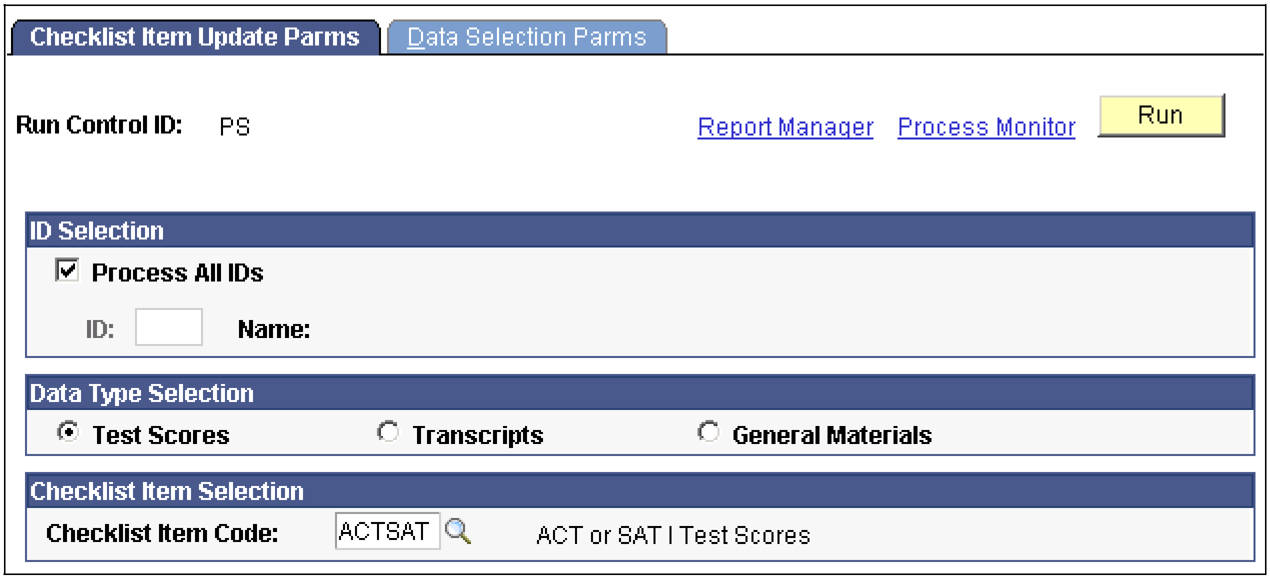
One Item and **Checklist Item Code**

Select this to update the checklist item that you specify, to a status of *Complete.* You must specify the checklist item to update.

After you run the process, you can view the CCCHKLER report, which lists the IDs and the checklist item codes that were updated.

Updating Test Score, Transcript, or General Material Checklist Items

Access the Checklist Item Update Parms page (Campus Community, Checklists, Process Checklists, Item Update - Automated, Checklist Item Update Parms).



Checklist Item Update Parms (parameters) page

ID Selection

Process All IDs or **ID** — Select Process All IDs to update all eligible checklist items for all IDs in your system, or specify the ID of the specific individual whose checklist item the process should update.

Data Type Selection

Data type selection relates to logic in the process that provides a linkage to admissions records where the applicable data resides. When the Test Scores button is clicked, the process evaluates data in the test score table as it updates checklist items.

Test Scores — Select to evaluate test score data in PeopleSoft Recruiting and Admissions to update checklist items.

Transcripts — Select to evaluate transcript data in PeopleSoft Recruiting and Admissions to update checklist items.

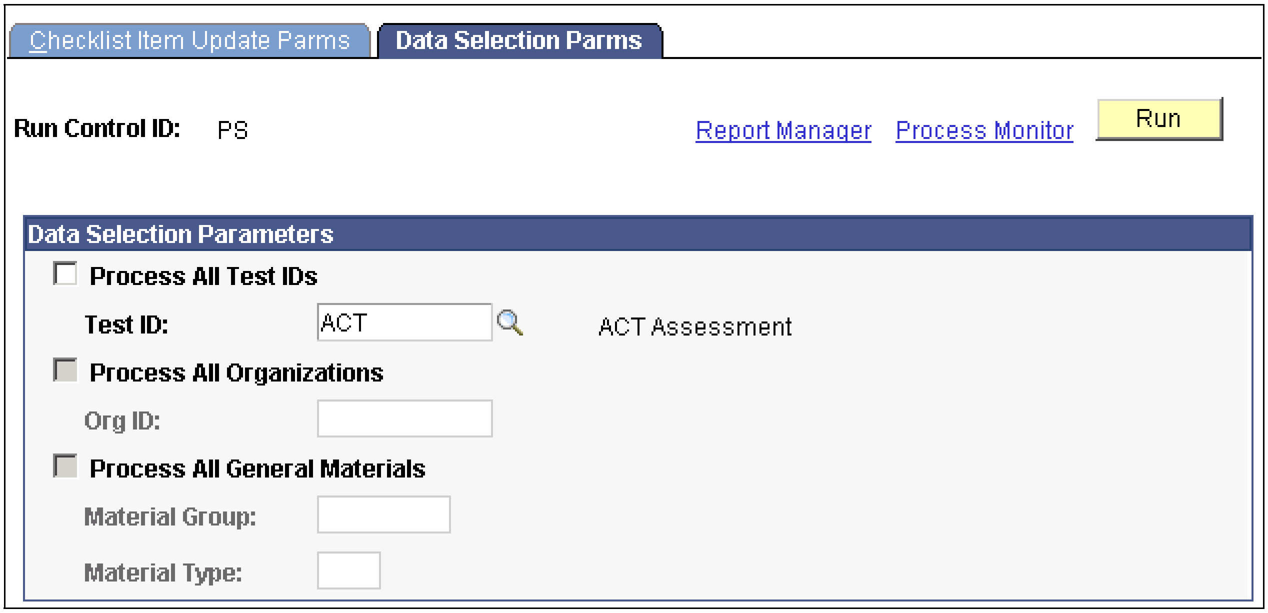
General Materials — Select to evaluate general materials data in PeopleSoft Recruiting and Admissions to update checklist items.

Checklist Item Selection

Checklist Item Code — Enter the code of the checklist item to update.

Specifying the Data to Update

Access the Data Selection Parameters page (Campus Community, Checklists, Process Checklists, Item Update - Automated, Data Selection Parms).



Data Selection Parms (parameters) page

Only the data selection parameters associated with the data types selected on the Update Parameters page are available.

Data Selection Parameters

Process All Test IDs or **Test ID**

Select Process All Test IDs for the process to update the checklist item for all test IDs, or specify the test from the Test Scores page (for example, *GRE* test) for which the system should update this checklist item.

If you select the Test Scores option in the Data Selection group box, you must either select Process All Test IDs or specify one test ID.

Process All Organizations or **Org ID**

Select Process All Organizations to evaluate all transcript data from all organizations to update the checklist item, or, specify the organization from the Education page (for example *000010008* Apache Junction High School), for which the system should update the checklist item.

Transcripts received are recorded by Organization in the PeopleSoft Recruiting and Admissions Education page.

If you select the Transcripts option in the Data Selection group box, you must either select Process All Organizations or specify one organization ID.

Process All General Materials or Material Group or **Material Type**

Select Process All General Materials to evaluate all general materials data to update this checklist item, or specify the material group from the General Materials page (for example, *UGRECOMM,* Undergraduate Recommendations) or the specific material type from the General Materials page (for example *REC,* Recommendation), for which the system should update this checklist item.

If you select the General Materials option in the Data selection group box, you must either select Process All General Materials to process all general materials or specify one material group or a material type.

Data Type Selection

Test Scores

When selected, indicates the process should evaluate the test IDs specified in the ID Selection group box to update checklist items.

Transcripts

When selected, indicates the process should evaluate the transcripts for the organizations specified in the ID Selection group box to update checklist items.

General Materials

When selected, indicates the process should evaluate the materials specified in the ID Selection group box to update checklist items.

Reviewing Checklists for Individuals

This section discusses how to:

- View detailed checklist data for an individual.
- View a summary of checklist item status for an individual.
- View a summary of tracking groups for an individual.
- View a summary of checklists in a tracking group for an individual.
- View tracking group data.

Pages Used to Review Checklists for Individuals

Page Name	*Definition Name*	*Navigation*	*Usage*
Checklist Detail 1 and Checklist Detail 2	PERS_CHKLST_MGMT1 PERS_CHKLST_MGMT2	Campus Community, Checklists, Person Checklists, Person Checklist Detail, Checklist Detail 1 or Checklist Detail 2	View detailed checklist data for an individual. (The Checklist Detail 1 and 2 pages are view only versions of the Checklist Management 1 and 2 pages.)

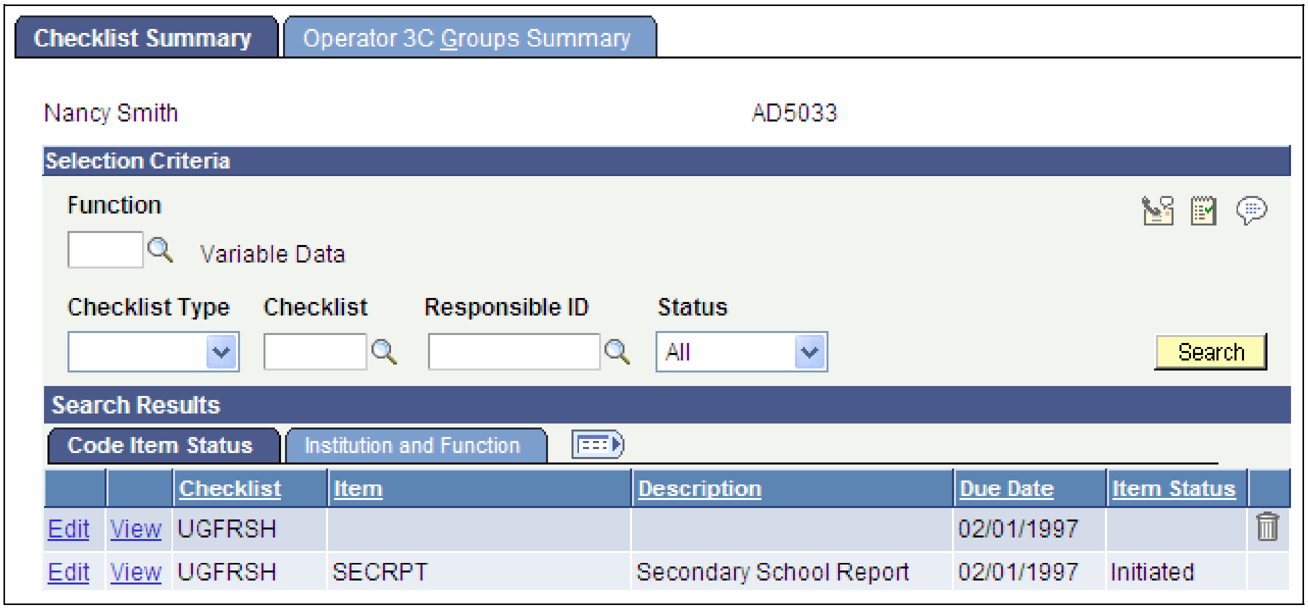
Page Name	*Definition Name*	*Navigation*	*Usage*
Checklist Summary	PERS_CHKLST_SUMM	• Campus Community, Checklists, Person Checklists, Person Checklist Summary • Records and Registration, 3 C's Summaries, Personal Checklist Summary	**Note.** If you license PeopleSoft Campus Self Service, you can also access the Checklist Summary page by selecting Self Service, Outreach, View Person Information, Constituent Information, Checklist Summary. View a summary of checklist item status for an individual and delete individual checklist items.
Person Tracking Summary	TRACKING_SUMMARY	Campus Community, Checklists, Person Checklists, Person Tracking Summary	View a summary of tracking groups for an individual to determine the groups with which an individual's checklists are associated and view the overall status of those tracking groups.
Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Person Tracking Summary page.	View a summary of checklists in a tracking group for an individual.
Person Tracking Inquiry	TRACKING_INQUIRY	Campus Community, Checklists, Person Checklists, Person Tracking Inquiry	View the variable data with which specific tracking groups are related.

Viewing Detailed Checklist Data for an Individual

The Checklist Detail 1 and 2 pages are view-only versions of the Checklist Management 1 and 2 pages where you assign checklist items to the individual.

Viewing a Summary of Checklist Item Status for an Individual

Access the Checklist Summary page (Campus Community, Checklists, Person Checklists, Person Checklist Summary).



Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for the individual and displays the results at the bottom of the page. You can enter values or any combination of values to limit the search.

Function The administrative area on which you want to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Checklist Type The type of checklist (for example, *Condition List*, *Communication List*, or *Requirements List*) for which you want to search.

Checklist Enter the code of the checklist for which you want to search. The available checklists are from the Checklists page.

Responsible ID The ID of the individual who is associated with or responsible for the checklist items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status — The status of the checklists for which to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

To delete a checklist item, click the trash can button beside the row. When you delete a checklist, all subordinate checklist items are also deleted. Activate this icon using the Allow Deletes from 3C Pages group box on the Campus Community Installation page.

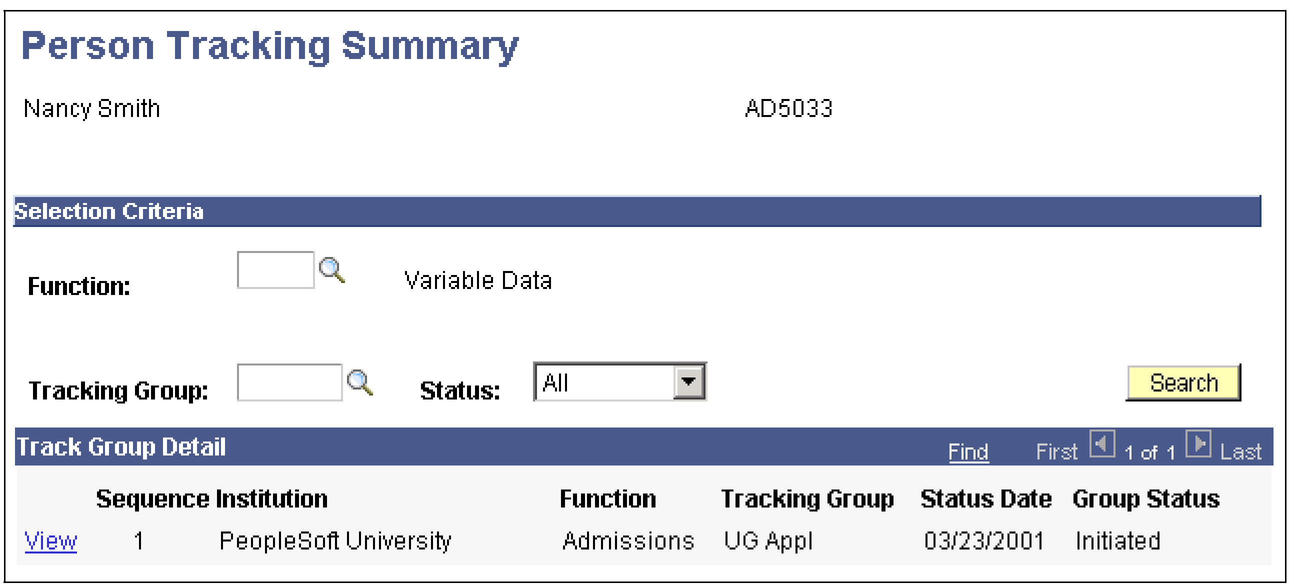
Search — Click to launch the search based on the selected criteria.

Institution and Function Tab

Use the Institution and Function tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the person who assigned or is responsible for the checklist item.

Viewing a Summary of Tracking Groups for an Individual

Access the Person Tracking Summary page (Campus Community, Checklists, Person Checklists, Person Tracking Summary).



Person Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function The administrative area on which you want to search.

Variable Data The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Tracking Group The tracking group on which you want to search.

Status The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search Click to launch the search based on the selected criteria.

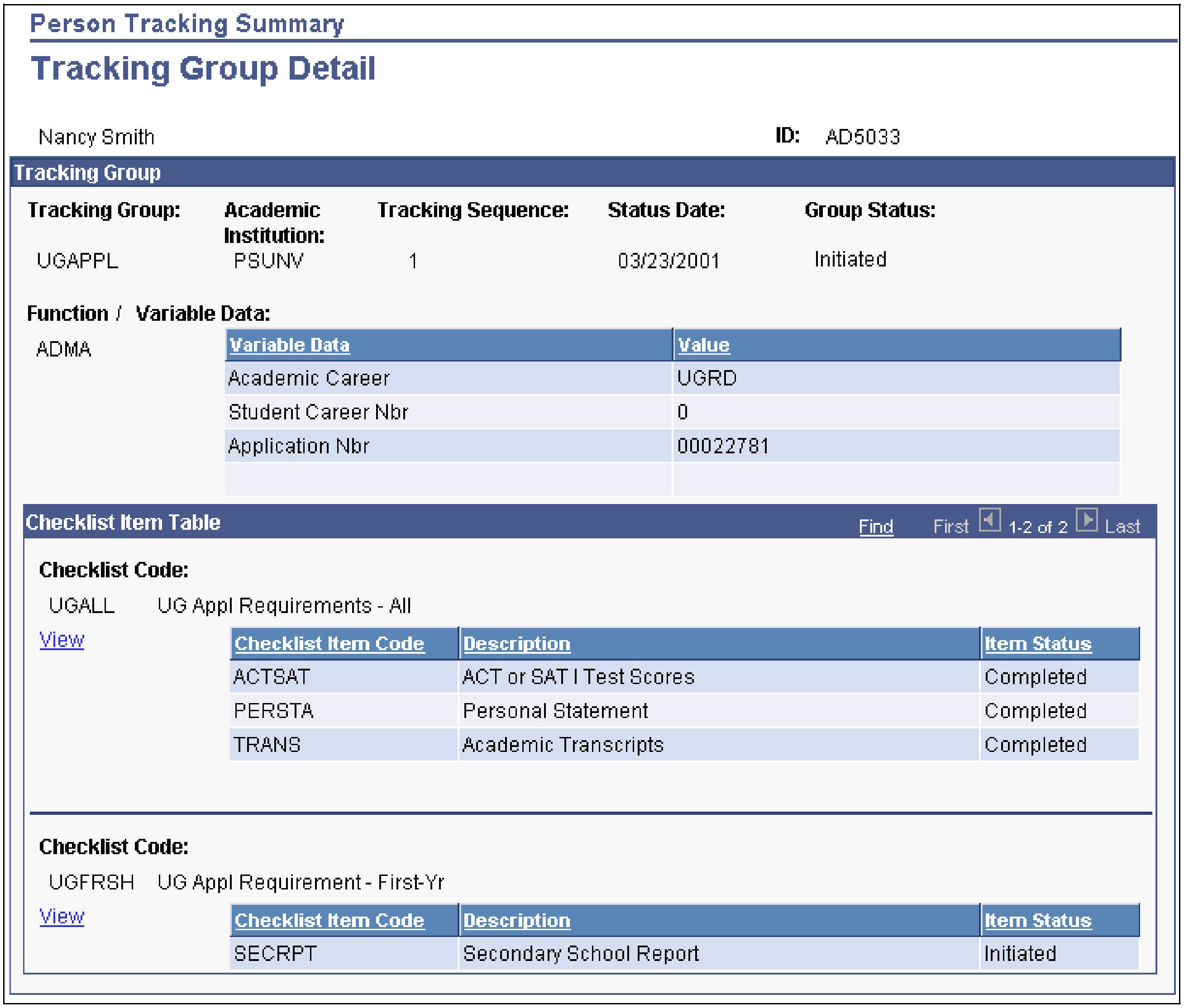
Track Group Detail

View If the user has 3C group inquiry access to view this checklist code and the administrative function is not *General,* this link is available. Click to access the Tracking Group page where you can view the checklist.

Note. If the function is *General,* the link might appear, but it will not transfer you.

Viewing a Summary of Checklists in a Tracking Group for an Individual

Access the Tracking Group Detail page (Click the View link on the Person Tracking Summary page).



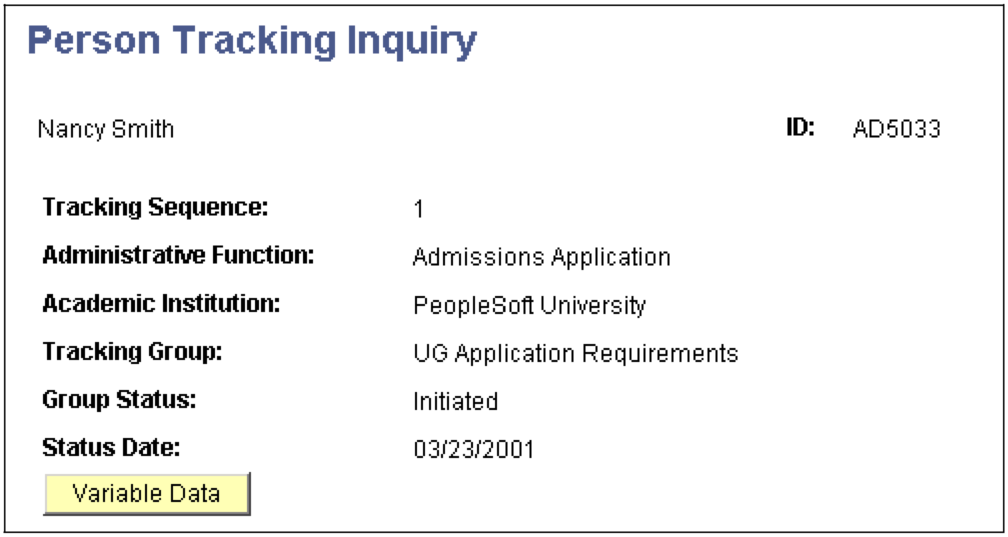
Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Click the View link to access the Checklist Detail pages for the checklist code.

Viewing Tracking Group Data

Access the Person Tracking Inquiry page (Campus Community, Checklists, Person Checklists, Person Tracking Inquiry).



Person Tracking Inquiry page

This page is for viewing purposes only. You cannot enter or modify data here. Click the Variable Data button to access the Variable Data page where you can review the variable data associated with this tracking group.

Reviewing Checklists for Organizations

This section discusses how to:

- View detailed checklist data for an organization.
- View a summary of checklist item status for an organization.
- View a summary of tracking groups for an organization.
- View a summary of checklists in a tracking group for an organization.
- View tracking group data.

Pages Used to Review Checklists for Organizations

Page Name	***Definition Name***	***Navigation***	***Usage***
Org Checklist Detail 1 and Org Checklist Detail 2	ORG_CHKLST_MGMT1 ORG_CHKLST_MGMT2	Campus Community, Checklists, Organization Checklists, Org Checklist Detail,	View detailed checklist data for an organization.

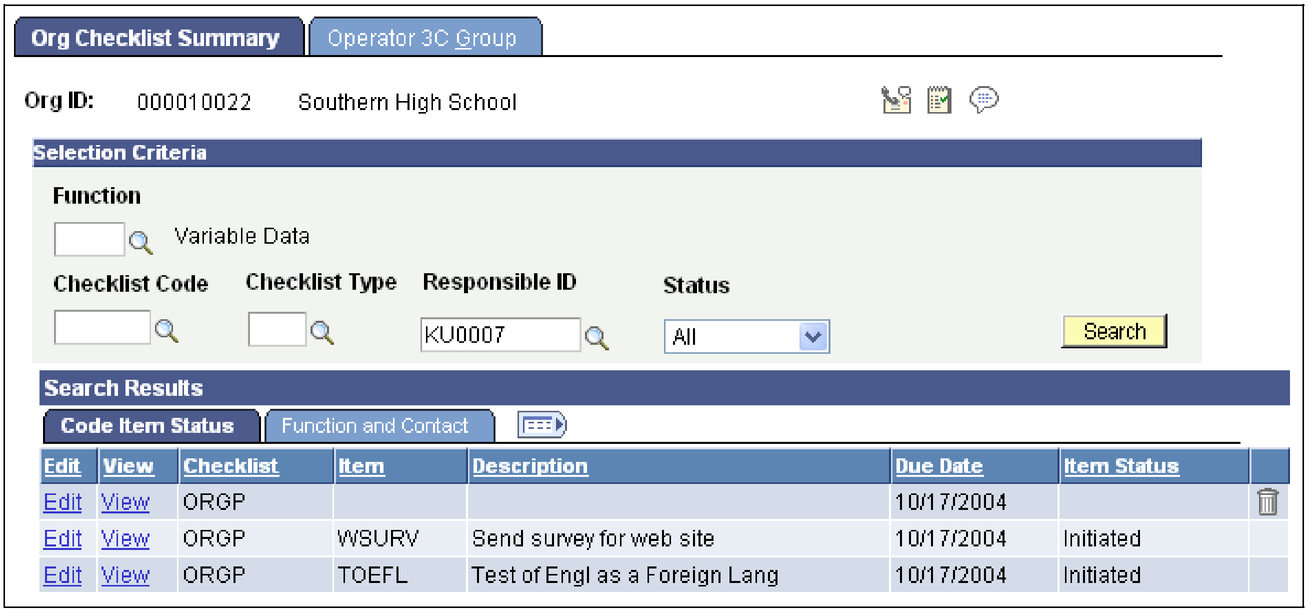
Page Name	*Definition Name*	*Navigation*	*Usage*
Org Checklist Summary	ORG_CHKLST_SUMMARY	Campus Community, Checklists, Organization Checklists, Org Checklist Summary	View a summary of checklist items for an organization. **Note.** If you licensed PeopleSoft Campus Self Service, you can also access the Org Checklist Summary page by selecting Self Service, Outreach, View Organization Information, Constituent Information - Org, Checklist Summary.
Organization Tracking Summary	ORG_TRACK_SUMMARY	Campus Community, Checklist, Organization Checklists, Org Tracking Summary	Review the tracking groups with which an organization's checklists are associated and the overall status of those tracking groups.
Organization Tracking Group Detail	CHECKLIST_SEC	Click the View link on the Organization Tracking Summary page.	Review information about a tracking group checklist for an organization.
Organization Tracking Inquiry	ORG_TRACK_INQUIRY	Campus Community, Checklists, Organization Checklists, Org Tracking Inquiry	View the variable data with which specific tracking groups are related.

Viewing Detailed Checklist Data for an Organization

The Organization Checklist Detail 1 and 2 pages are view-only versions of the Organization Checklist Management 1 and 2 pages where you assign checklist items to the organization. You cannot enter or edit data here.

Viewing a Summary of Checklist Item Status for an Organization

Access the Org Checklist Summary page (Campus Community, Checklists, Organization Checklists, Org Checklist Summary).



Org Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system searches for all checklists for this organization and displays the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Function — The administrative area on which you want to search.

Variable Data — The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this organization

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Checklist Code — The checklist on which you want to search. The available checklists are from the Checklists page.

Checklist Type — The type of checklist *(Condition List*, *Communication List*, *Requirements List*, and so on) for which you want to search.

Responsible ID

The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status

The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

To delete a checklist item, click the trash can button beside the row. When you delete a checklist, all subordinate checklist items are also deleted. Activate this icon using the Allow Deletes from 3C Pages group box on the Campus Community Installation page.

Search

Click this button to launch the search based on the selected criteria.

Click the Communication button to transfer to the Organization Communication page, where you can add a new communication for this organization.

Click the Checklist button to transfer to the Assigning a Checklist to an Organization, where you can add a new checklist for this organization.

Click the Comment button to transfer to the Organizational Comment Entry page, where you can enter a new comment for this organization.

Code Item Status Tab

Edit

Click this link to access the Org Checklist Management 1 page, where you can edit the checklist.

The Edit link is available only if the user has 3C group update access for this checklist code.

View

Click this link to access the Org Checklist Management 1 page, where you can view the checklist.

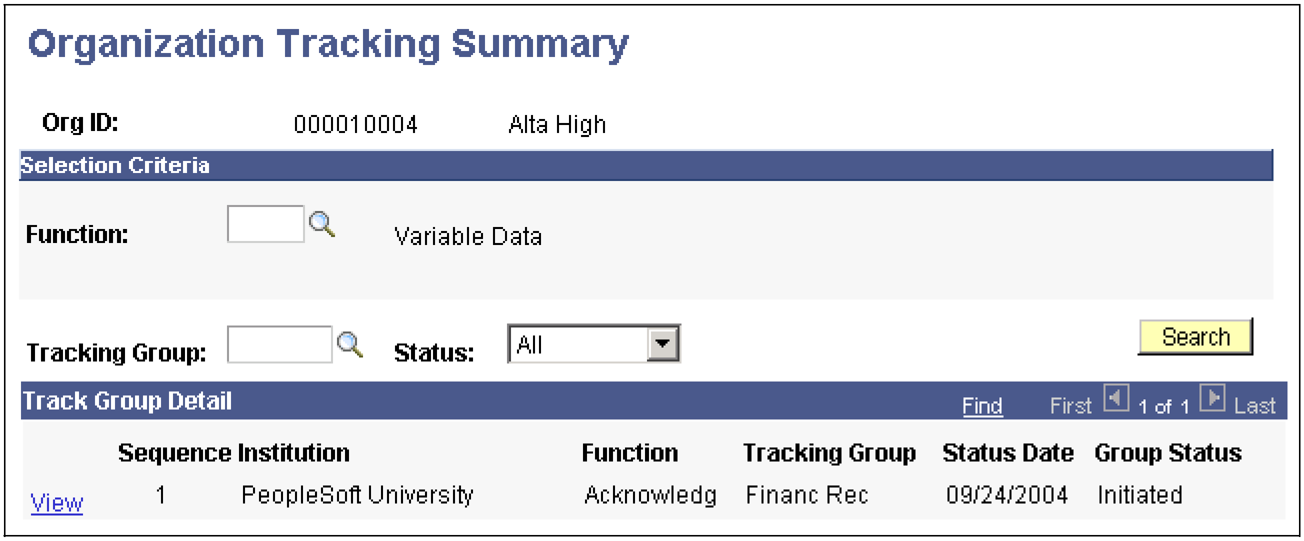
The View link is available only if the user has 3C group inquiry access for this checklist code.

Function and Contact Tab

Use the Function and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.

Viewing a Summary of Tracking Groups for an Organization

Access the Organization Tracking Summary page (Campus Community, Checklist, Organization Checklists, Org Tracking Summary).



Organization Tracking Summary page

Selection Criteria

If you click the Search button without entering any values, the system will search for all tracking groups that include this individual and display the results at the bottom of the page. You can enter a value or any combination of values to limit your search.

Function

The administrative area on which to search.

Variable Data

The Variable Data link becomes available when a function is selected. Click the link to access the Variable Data page where you can enter the variable data associated with this administrative function for this individual.

Variable data provides a powerful searching tool for reviewing checklists. By entering variable data as search criteria, you can limit the search to the results relevant to the specified function.

Tracking Group

The tracking group on which to search.

Status

The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

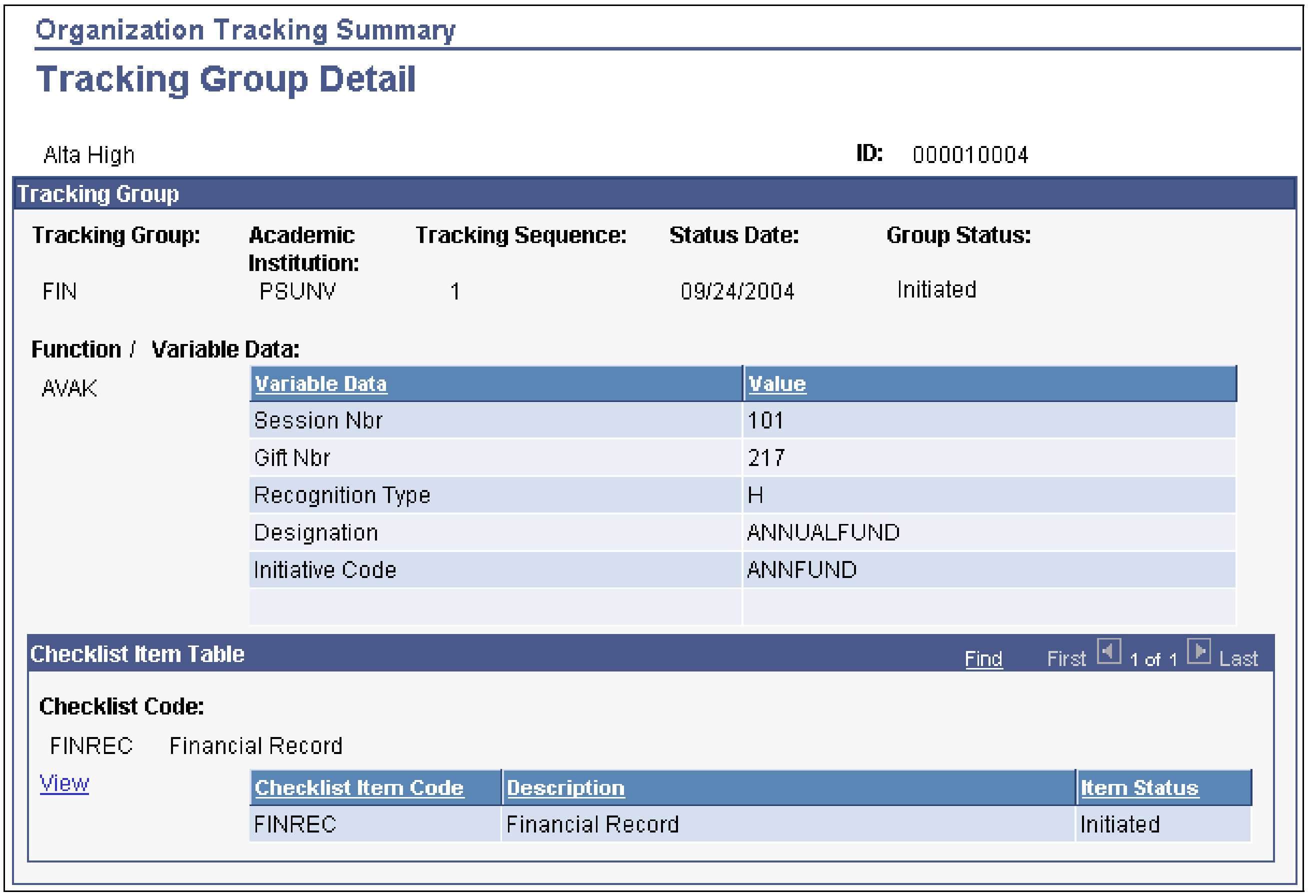
Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Track Group Detail

View	If the user has 3C group inquiry access for this checklist code and the administrative function is not *General*, this link is available. Click this link to access the Tracking Group Detail page where you can view the checklist. **Note.** If the function is *General*, the link might appear on the page, but it will not transfer you.

Viewing a Summary of Checklists in a Tracking Group for an Organization

Access the Tracking Group Detail page (click the View link on the Organization Tracking Summary page).



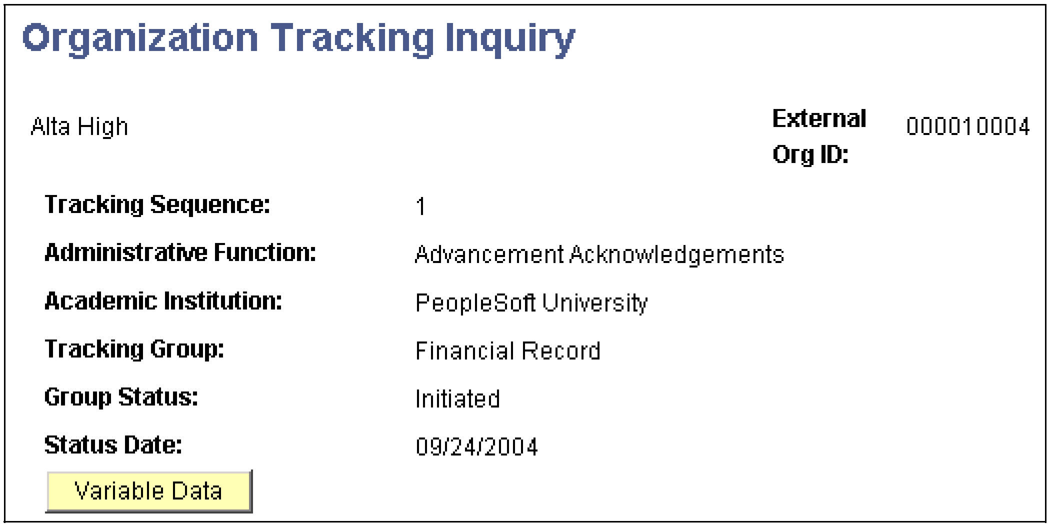
Tracking Group Detail page

This page is for viewing purposes only. You cannot enter or modify data here.

Click the View link to access the Org Checklist Detail 1 page for the checklist code.

Viewing Tracking Group Data

Access the Organization Tracking Inquiry page (Campus Community, Checklists, Organization Checklists, Org Tracking Inquiry).



Organization Tracking Inquiry page

This page is for viewing purposes only. You cannot enter or modify data here. Click the Variable Data button to access the Variable Data page where you can review the variable data associated with this tracking group.

Reviewing Checklists for Events

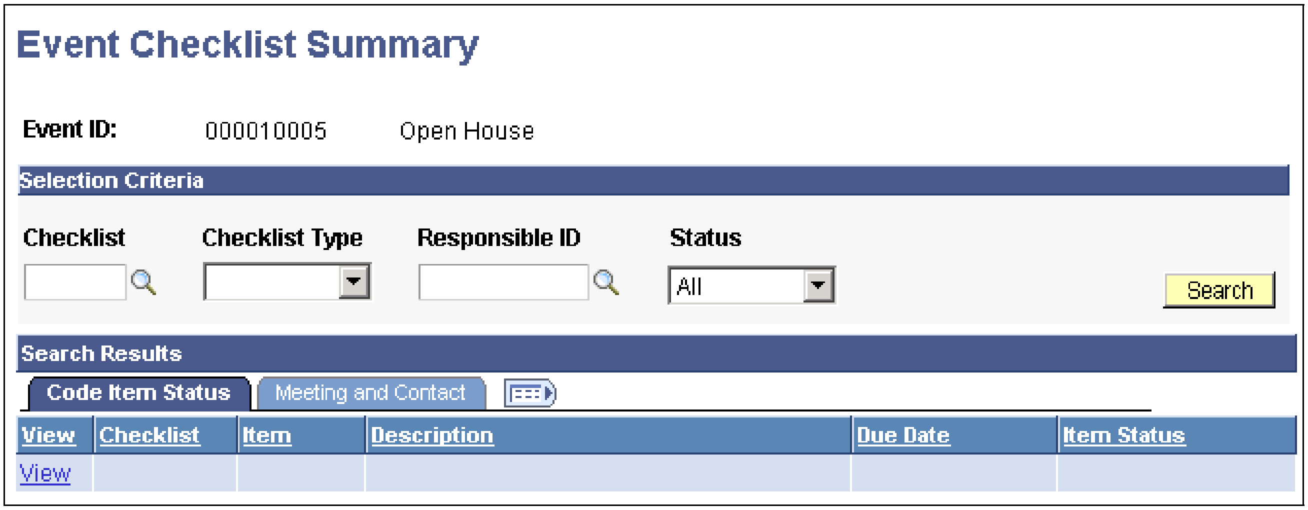
This section discusses how to view all checklist items assigned to an event.

Page Used to Review Checklists for Events

Page Name	*Definition Name*	*Navigation*	*Usage*
Event Checklist Summary	EVENT_CHKLST_SUMM	Campus Community, Checklists, Event Checklists, Event Checklist Summary	Review all of the checklist items assigned to an event.

Viewing All Checklist Items Assigned to an Event

Access the Event Checklist Summary page (Campus Community, Checklists, Event Checklists, Event Checklist Summary).



Event Checklist Summary page: Code Item Status tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields that are common to all views first.

Common Page Information

If you click the Search button without entering any values, the system will search for all checklists for this organization and display the results at the bottom of the page. You can enter a value or any combination of values to limit the search.

Checklist

The checklist on which to search. The available checklists are from the Checklists page.

Checklist Type

The type of checklist (for example, *Condition List*, *Communication List*, or *Requirements List*) for which you want to search.

Responsible ID

The ID of the individual who is associated with, or responsible for, the checklists items for which you want to search.

The system displays the logged-in user ID. You can remove or change this default ID for your search.

Status

The status of the checklists for which you want to search.

All: The system searches for all checklist items regardless of status.

Completed: The system searches for only completed checklist items.

Initiated: The system searches for only checklist items that have been initiated but not yet completed.

Search

Click this button to launch the search based on the selected criteria.

Code Item Status Tab

View	Click to access the Event Checklist Management 1 page where you can view the checklist. The View link is available only if the user has 3C group inquiry access for this checklist code.

Meeting and Contact Tab

Use the Meeting and Contact tab to determine the institution, administrative function, and checklist type associated with the checklist item. Also use it to determine the name of the contact person for the checklist item.

Deleting Checklists

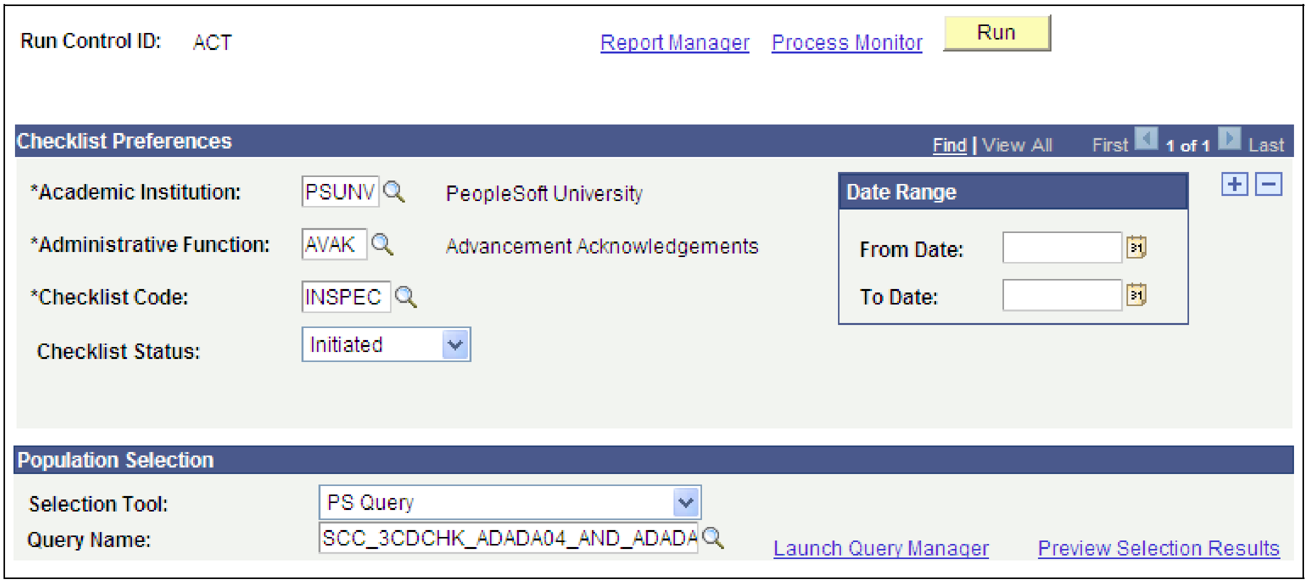
This section discusses how to delete checklists in batch.

Page Used to Delete Checklists

Page Name	*Definition Name*	*Navigation*	*Usage*
Delete Checklists	SCC_DEL_CHKLST	Campus Community, Checklists, Delete Checklists	Define processing parameters to run the Delete Checklists process.

Deleting Checklists in Batch

Access the Delete Checklists page.



Delete Checklists page

Select one or more parameters to narrow the set of checklists to be deleted. The Academic Institution, Administrative Function, and Checklist Code fields are required; all other parameter selections are optional. To define a subset of specific IDs for which you want to delete communications, use the Population Selection group box.

Administrative Function

Select an administrative function. The values available here are defined on the Administrative Function Table.

Checklist Code

Select the code that identifies individual checklists, which are comprised of one or more checklist items. Checklist codes are defined on the Checklist Table page. The codes available are restricted by the user's 3C Group Security.

From Date and **To Date**

These fields are optional; however if used, both date fields must be completed and the From Date value must precede the To Date value.

Use the Population Selection group box to define a set of IDs, select a PS Query or define an external file. Queries available for selection have the 3C Delete Bind Record "SCC_3CDCHK" included in the query. IDs returned by the Population Selection process apply to all Checklist Preference rows in the component.

After you specify the parameters, you can run the SCC_3CD_CHK Application Engine process by clicking the Run button. When you click the Run button, the system searches for all checklists matching the parameters specified on this page and deletes them. Only the target checklist items are deleted and any related communications and comments remain, while maintaining the relationships between the relevant 3C tables.

Chapter 51

Using the Student Services Center Component

This chapter discusses the Student Services Center component for administrative users, and describes how to:

- Set up the Student Services Center component.
- View and edit an individual's information.

Setting Up the Student Services Center Component

Use the Student Services Center Setup page to control the order in which the tabbed pages appear in the Student Services Center component and to define the labels used on the tabs. Also, select the information that you want to make available to administrative users on each page of the Student Services Center component. The available information appears or does not appear for a user based on the user's security.

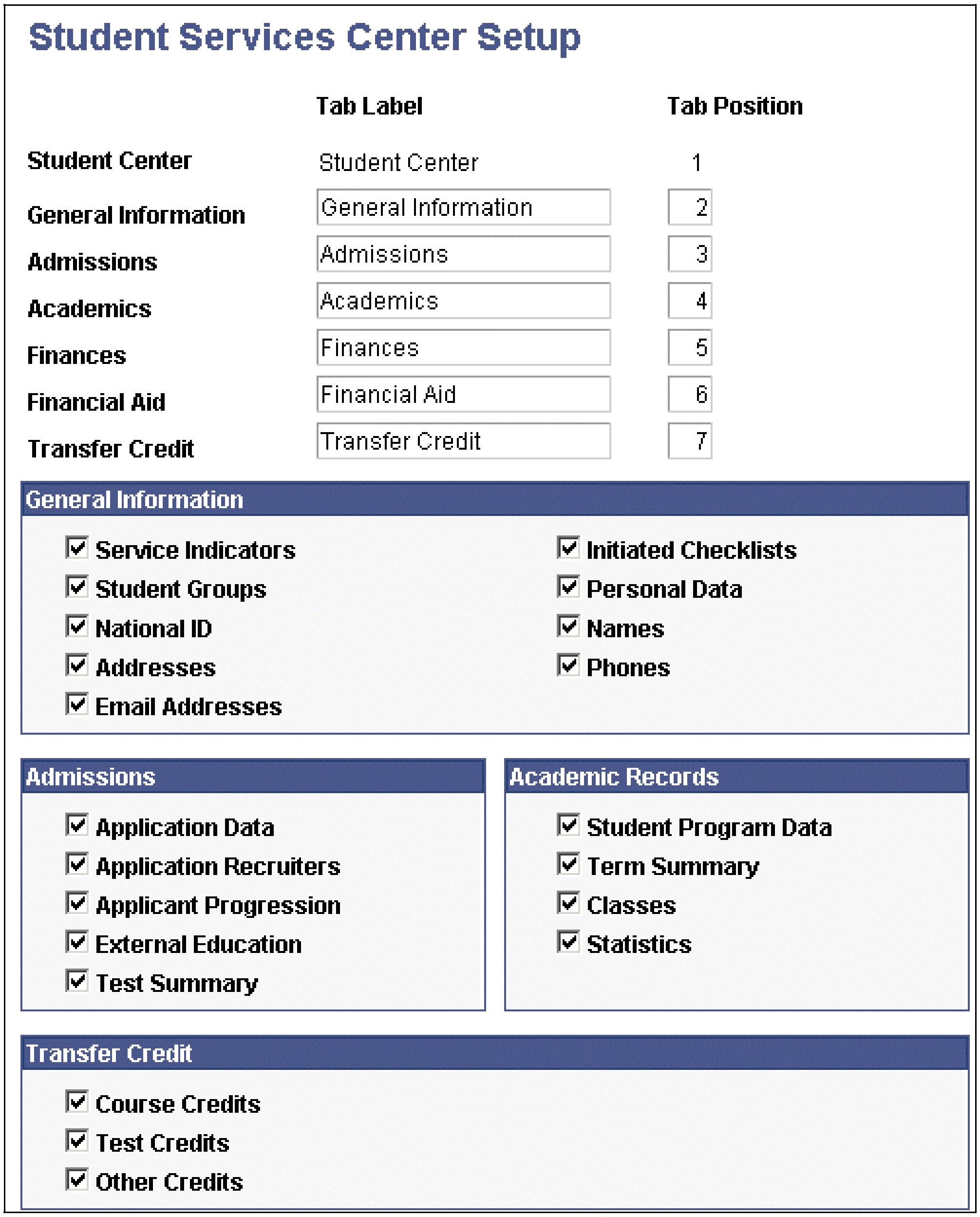
This section discusses how to set up the Student Services Center component.

Page Used to Set Up the Student Services Center Component

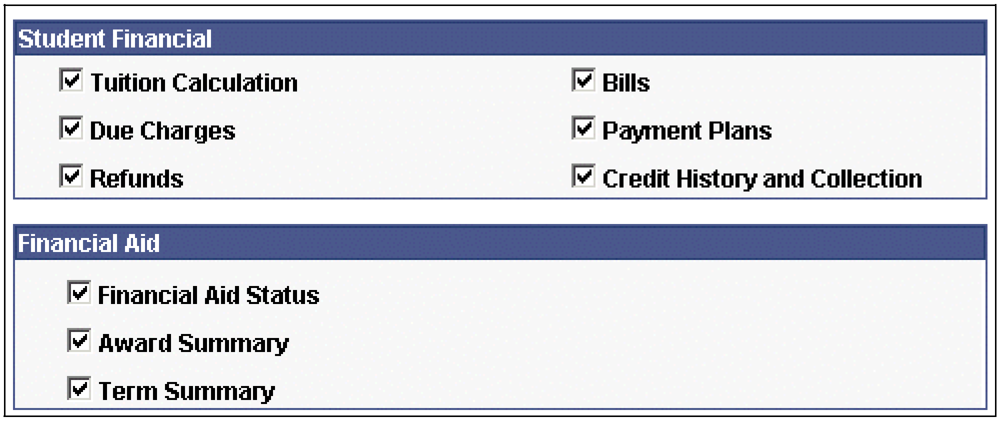
Page Name	***Definition Name***	***Navigation***	***Usage***
Student Services Center Setup	SCC_SUM_CFG	Set Up SACR, Common Definitions, Student Services Center Setup	Select the information to display in the Student Services Center component.

Setting Up the Student Services Center Component

Access the Student Services Center Setup page (Set Up SACR, Common Definitions, Student Services Center Setup).



Student Services Center Setup page (1 of 2)



Student Services Center Setup page (2 of 2)

Enter tab labels and tab positions (2-7), as you want them to appear in the Student Services Center component. If you try to save duplicate tab positions, an error message occurs.

Tab labels and positions are listed as delivered. You can modify all but the Student Center tab label and position. The Student Center tab is hard coded to be the first tab, which provides the administrative user quick access to the same view as the individual has on the Student Center page in PeopleSoft Campus Self Service.

Note. Each tab of the Student Services Center component acts as a separate component. This enables you to use standard PeopleTools security to set individual security access to the tabs. If you do not want a tab to appear, do not give anyone access to it in PeopleTools security and the page will not appear. Users must have access to the Student Center tab to have access to any of the other tabs.

Select the information that you want to make available on the General Information, Admissions, Academics, Transfer Credit, Student Financials (Finances), and Financial Aid pages.

The available information will then appear or not appear for a specific administrative user depending on the security set for that user on the Academic Institution Security, Institution/Career Security, Academic Program Security, Academic Plan Security, Application Center Security, Test ID Security, 3C Groups, and Service Indicators components. The user's Demographic Data Access (DDA) security also applies to either mask or display the student's national ID and date of birth.

If a user has multiple security levels upon redirection to core components from the Student Services Center, the highest level of access security is used. For example, if a user has corrections-access to a component from one menu and read-only access to the same component from another menu, the corrections access is granted when the user is redirected to the component.

Note. Information that appears on the Student Center tab is controlled on the Student Center Options page (Set Up SACR, Common Definitions, Self Service, Student Center). The setup on this page does not override Campus Solutions security setup.

Viewing and Editing an Individual's Information

Use the Student Services Center component to view and access detailed information about a student or other individual.

Note. Only current and future-dated information appears in the Student Services Center component.

This section discusses how to:

- View an individual's Student Center information.
- View an individual's general information.
- View a student's admissions information.
- View a student's transfer credit information.
- View a student's academics information.
- View a student's self-service finances information.
- View a student's self-service financial aid information.

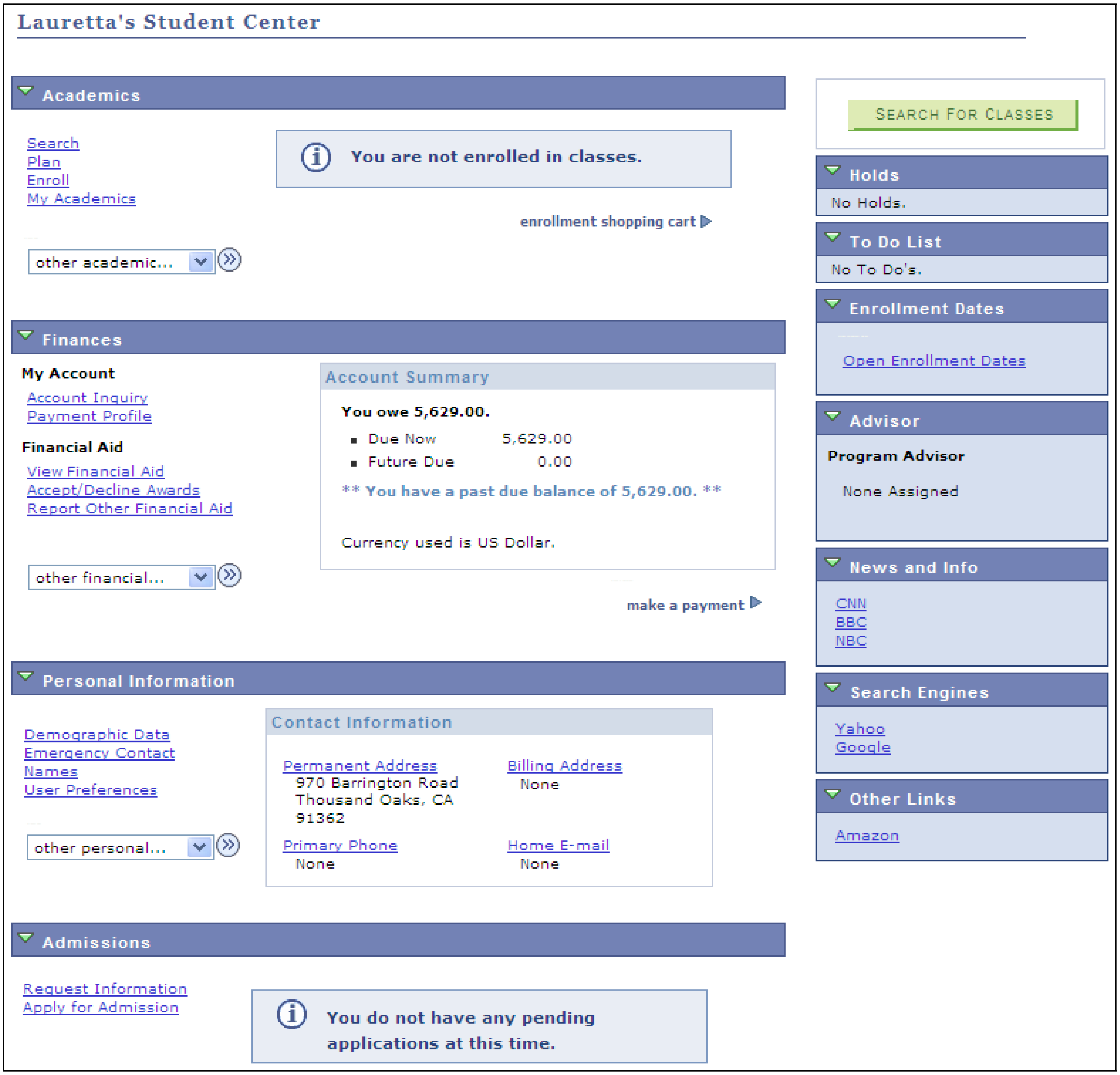
Pages Used to View and Edit an Individual's Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Student Center	SSS_STUDENT_CENTER	Campus Community, Student Services Center, Student Center	Provides administrator ability to see what a specific individual, such as a student, sees on the Student Center self-service page.
General Information	SCC_SUM_PERSONAL	Campus Community, Student Services Center, General Information	Provides administrator at-a-glance overview of the individual's personal information with access to further detail such as initiated checklist items, service indicators and student groups.
Admissions	SCC_SUM_ADMISSIONS	Campus Community, Student Services Center, Admissions	Provides administrator access to the student's self-service Admissions View with access to further detail.
Transfer Credit	SCC_SUM_TRNSFRCRDT	Campus Community, Student Services Center, Transfer Credit	Provides administrator overview of a specific student's transfer credit information with easy access to transfer credit transactions.

Page Name	***Definition Name***	***Navigation***	***Usage***
Academics	SCC_SUM_ACADEMICS	Campus Community, Student Services Center, Academics	Provides administrator overview of a specific student's academic information with easy access to academics transactions.
Finances	SCC_SUM_FINANCES	Campus Community, Student Services Center, Finances	Provides administrator overview of a specific student's financial information with easy access to finances transactions.
Financial Aid	SCC_SUM_FA	Campus Community, Student Services Center, Financial Aid	Provides administrator overview of a specific student's financial aid information with easy access to financial aid transactions.

Viewing an Individual's Student Center Information

Access the Student Center page (Campus Community, Student Services Center, Student Center).



Student Center page

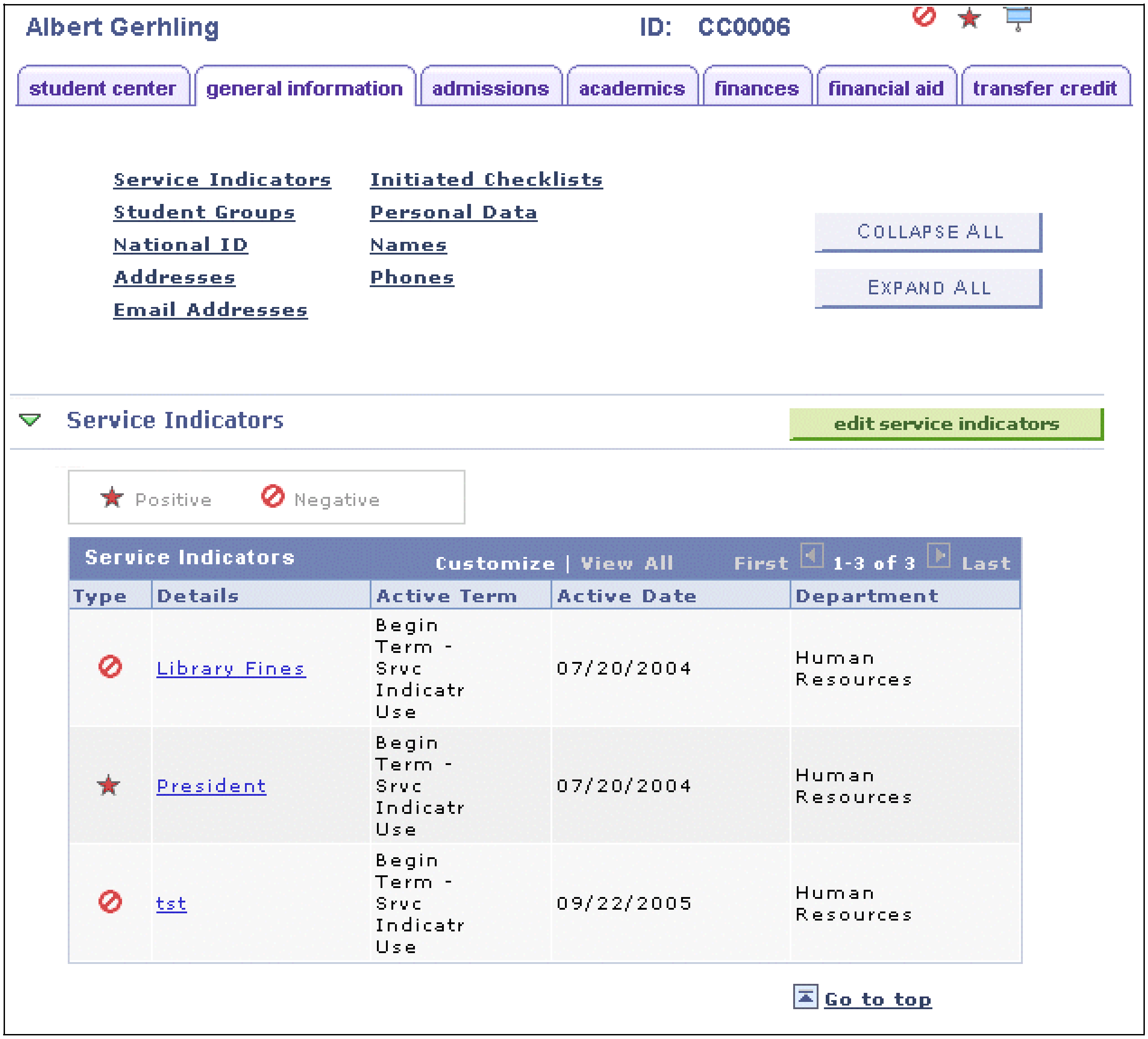
This page provides the same view of the self-service Student Center page as the self-service user sees. Clicking any of the buttons or links on this page takes the administrator to the same self-service destinations.

Enroll in Direct Deposit is available in the other financial field only if the Direct Deposit Enrollment check box is selected on the SF Institution Set - General Options page.

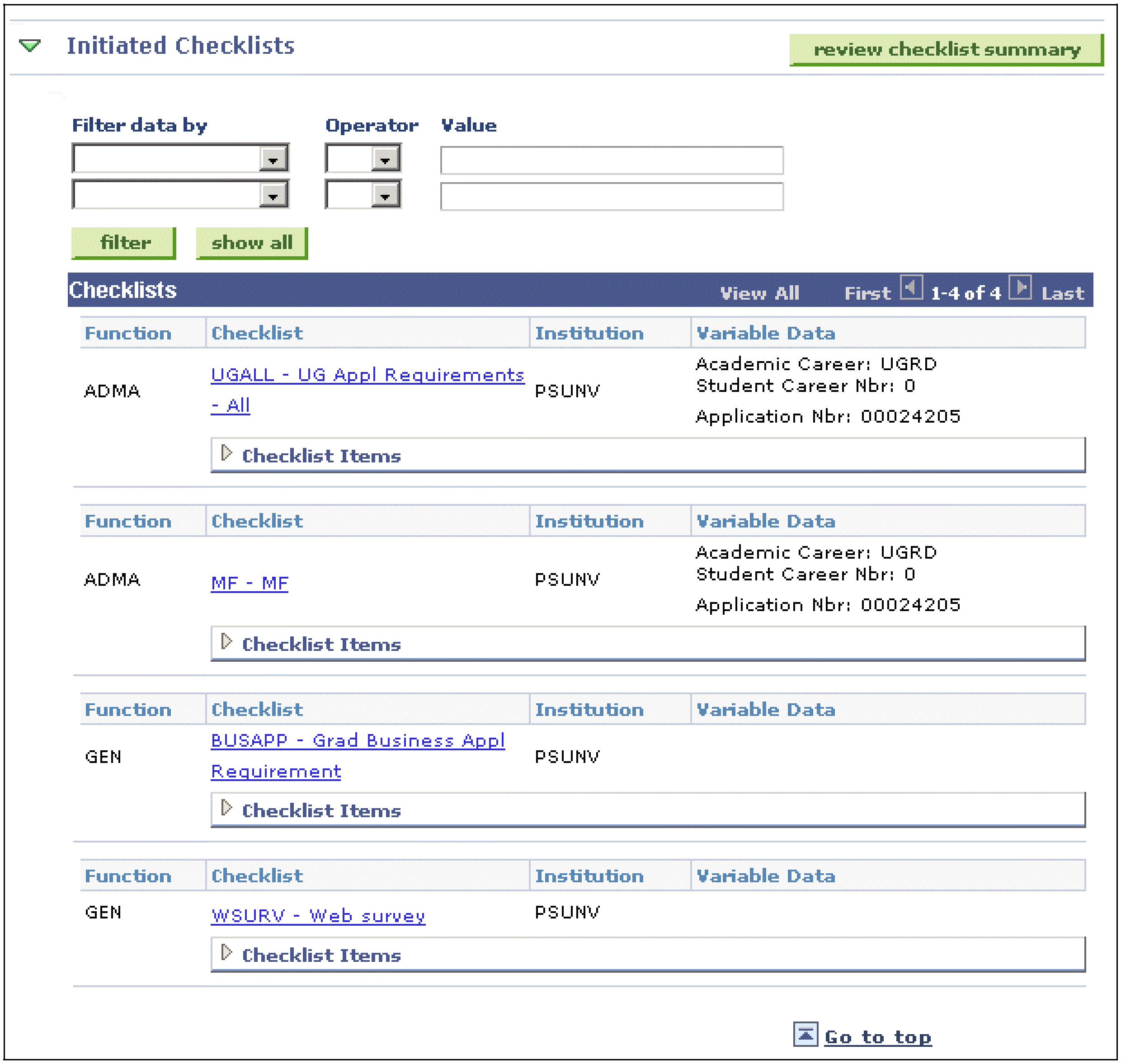
Note. When you click the Demographic Data link in the Personal Information section of the General Information page. DDA security (masking of the national ID or date of birth) is enforced. This way the administrative user will not see sensitive information that he or she is allowed to see from other pages or search records. The masking configuration applies for administrative users viewing the Student Center page from the Student Services Center.

Viewing an Individual's General Information

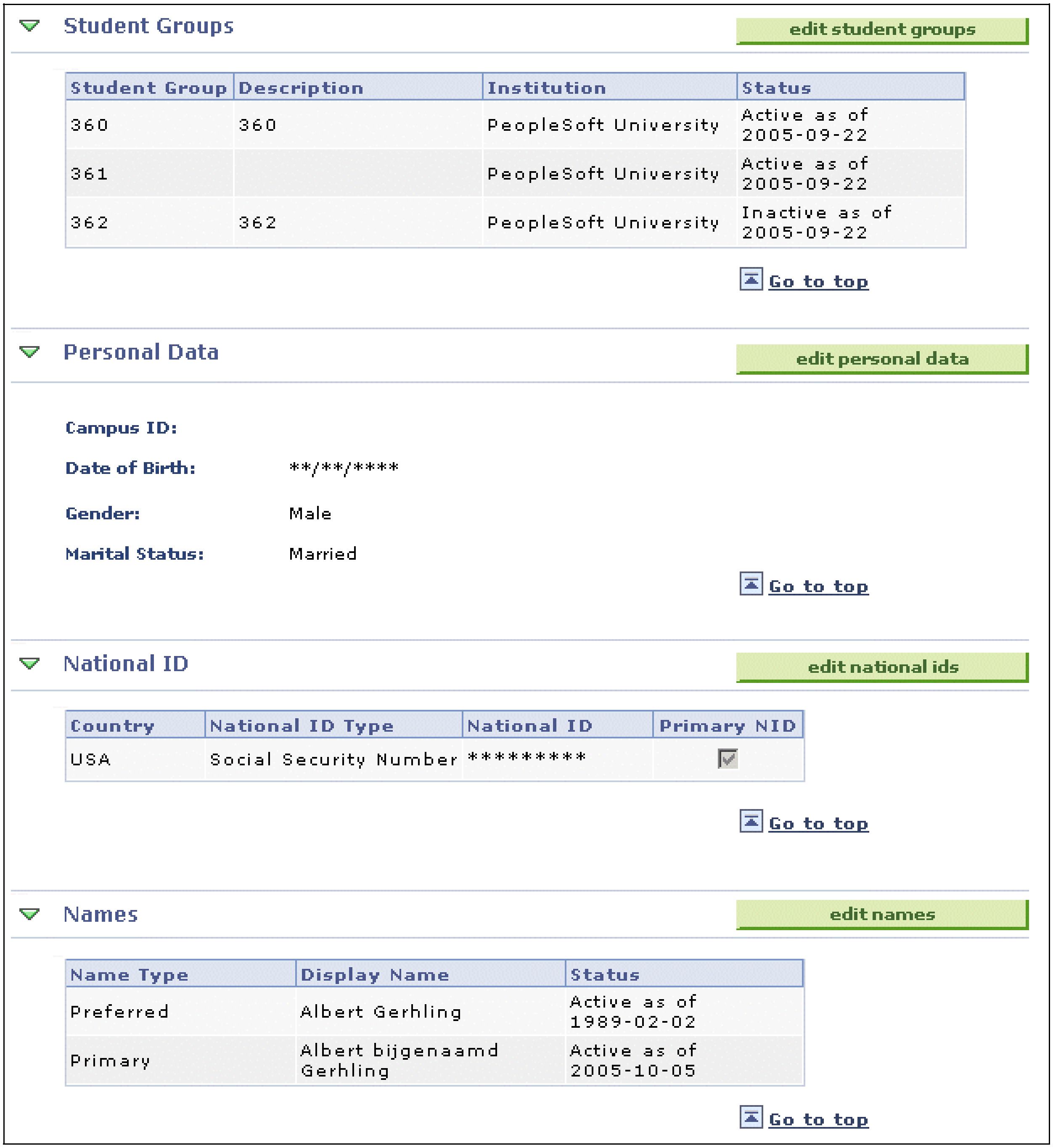
Access the General Information page (Campus Community, Student Services Center, General Information).



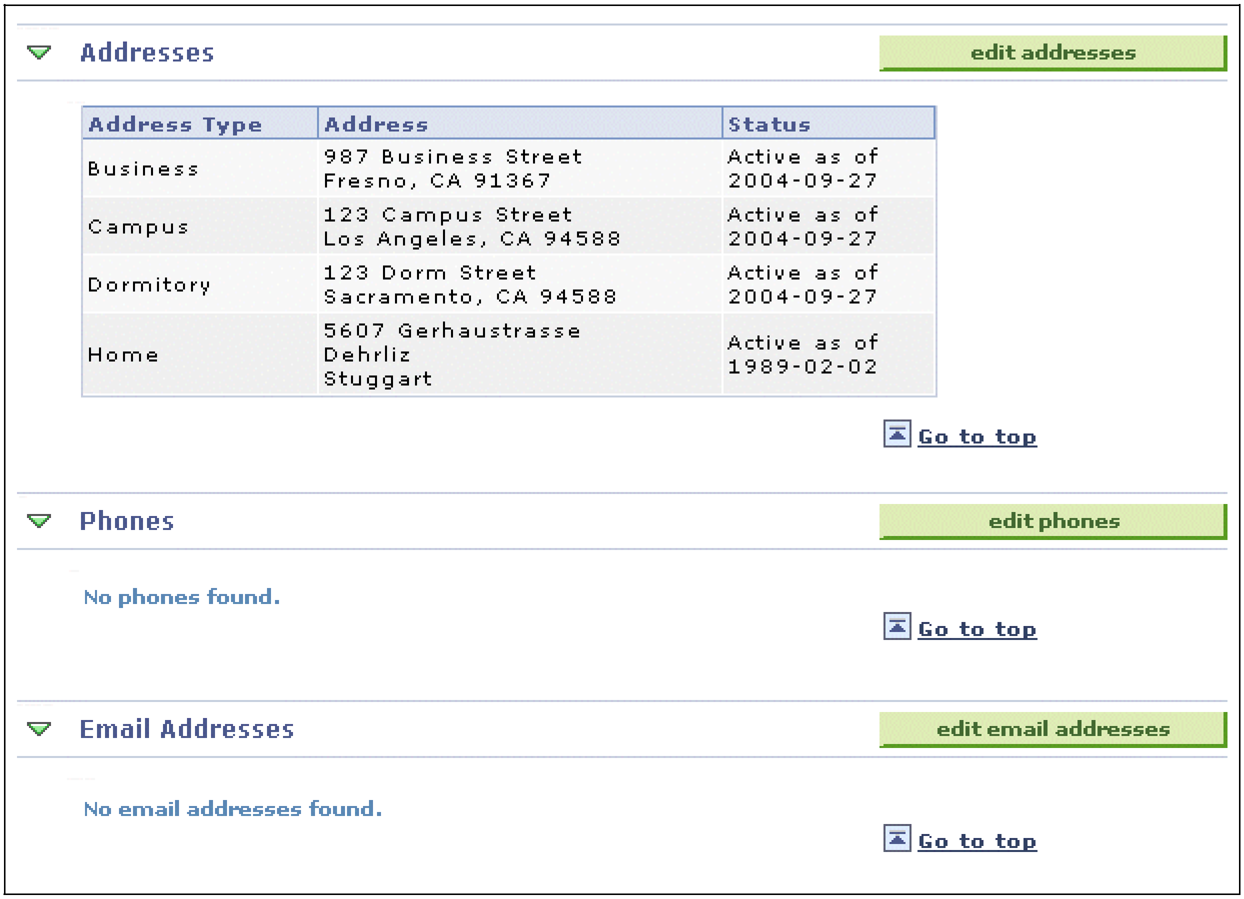
General Information page (1 of 4)



General Information page (2 of 4)



General Information page (3 of 4)



General Information page (4 of 4)

This page provides an overview of the individual's general information from components in the Campus Community menu and the Student Groups component available from Admissions, Student Records, and other menus.

Individuals can see some of the same information from the self-service Campus Personal Information menu.

Note. If an administrative user does not have security access to a feature on the General Information page, the action button related to that information is not available so that the user cannot see or update the information in the core component. For example, if an administrative user does not have access to the core Service Indicator Data page, the Edit Service Indicators button is not displayed.

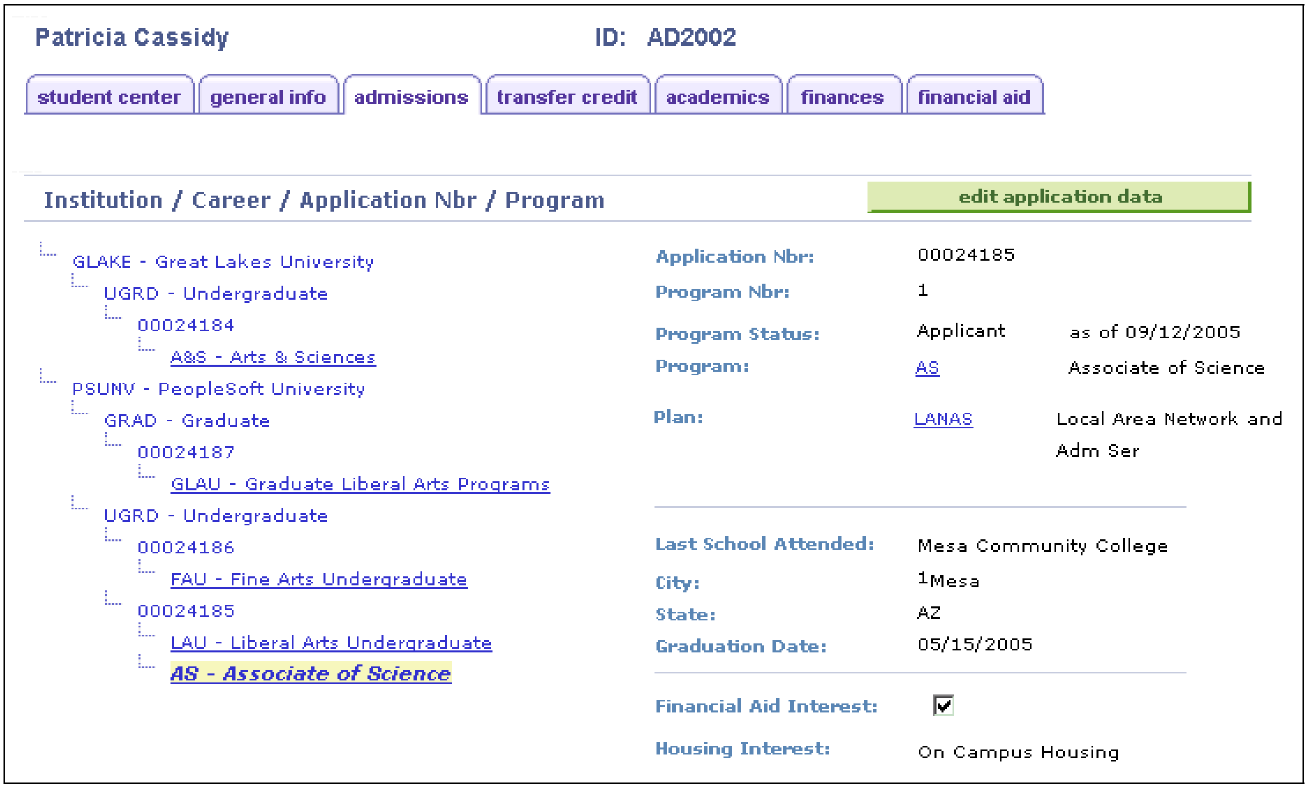
This table lists the actions available on the General Information page and the core component to which the user is redirected for more detail:

Action Button	***Destination Component and 1st Page***	***Core Navigation***	***Self-Service Navigation***
Edit Service Indicators	SERVICE_IND_PERS SRVC_IND_DATA1	Campus Community, Service Indicators, Person, Manage Service Indicators	Self Service, Campus Personal Information, Holds

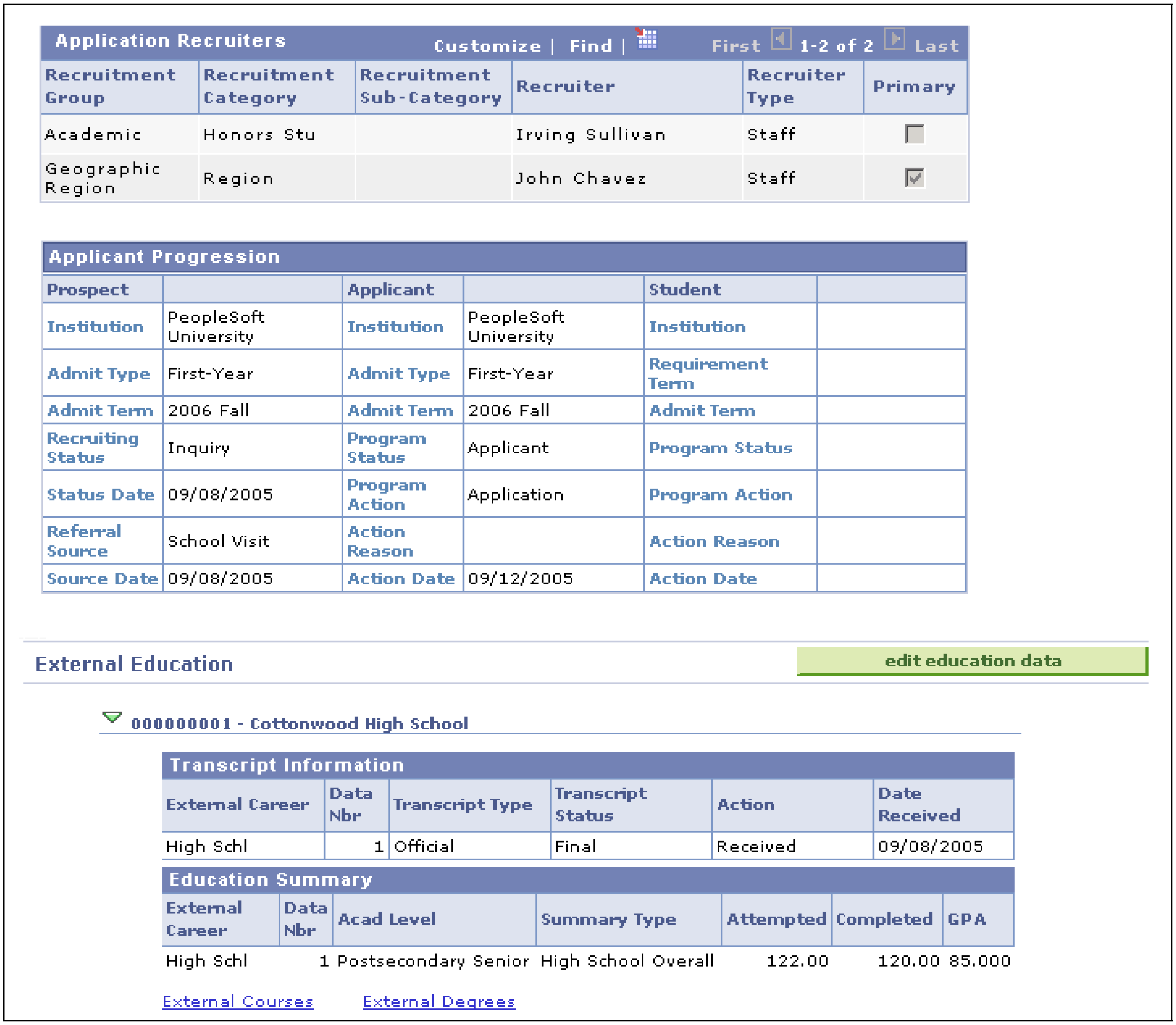
Action Button	***Destination Component and 1st Page***	***Core Navigation***	***Self-Service Navigation***
Review Checklist Summary	CHKLST_SUMM_PERS PERS_CHKLST_SUMM	Campus Community, Checklists, Person Checklists, Person Checklist Summary	Self Service, Campus Personal Information, To Do List
Edit Student Groups	STDNT_GROUPS_PERS STDNT_GROUPS	Records and Enrollment, Career and Program Information, Student Groups	None
Edit Personal Data	SCC_BIO_DEMO SCC_BIO_DEMO_PERS	Campus Community, Personal Information, Add/Update a Person, Biographical Details	Self Service, Campus Personal Information, Demographic Information
Edit National IDs	SCC_BIO_DEMO SCC_BIO_DEMO_PERS	Campus Community, Personal Information, Add/Update a Person, Biographical Details	Self Service, Campus Personal Information, Demographic Information
Edit Names	NAMES_PERS SCC_NAMES_89	Campus Community, Personal Information, Biographical, Names	Self Service, Campus Personal Information, Names
Edit Addresses	ADDRESS_MAINT ADDRESSES_89	Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses	Self Service, Campus Personal Information, Addresses
Edit Phones	PHONE_PERS PHONE_PERS	Campus Community, Personal Information, Biographical, Addresses/Phones, Phones	Self Service, Campus Personal Information, Phone Numbers
Edit Email Addresses	E_MAIL_ADDR_PERS E_ADDR_PERS	Campus Community, Personal Information, Biographical, Addresses/Phones, Electronic Addresses	Self Service, Campus Personal Information, Email Addresses

Viewing a Student's Admissions Information

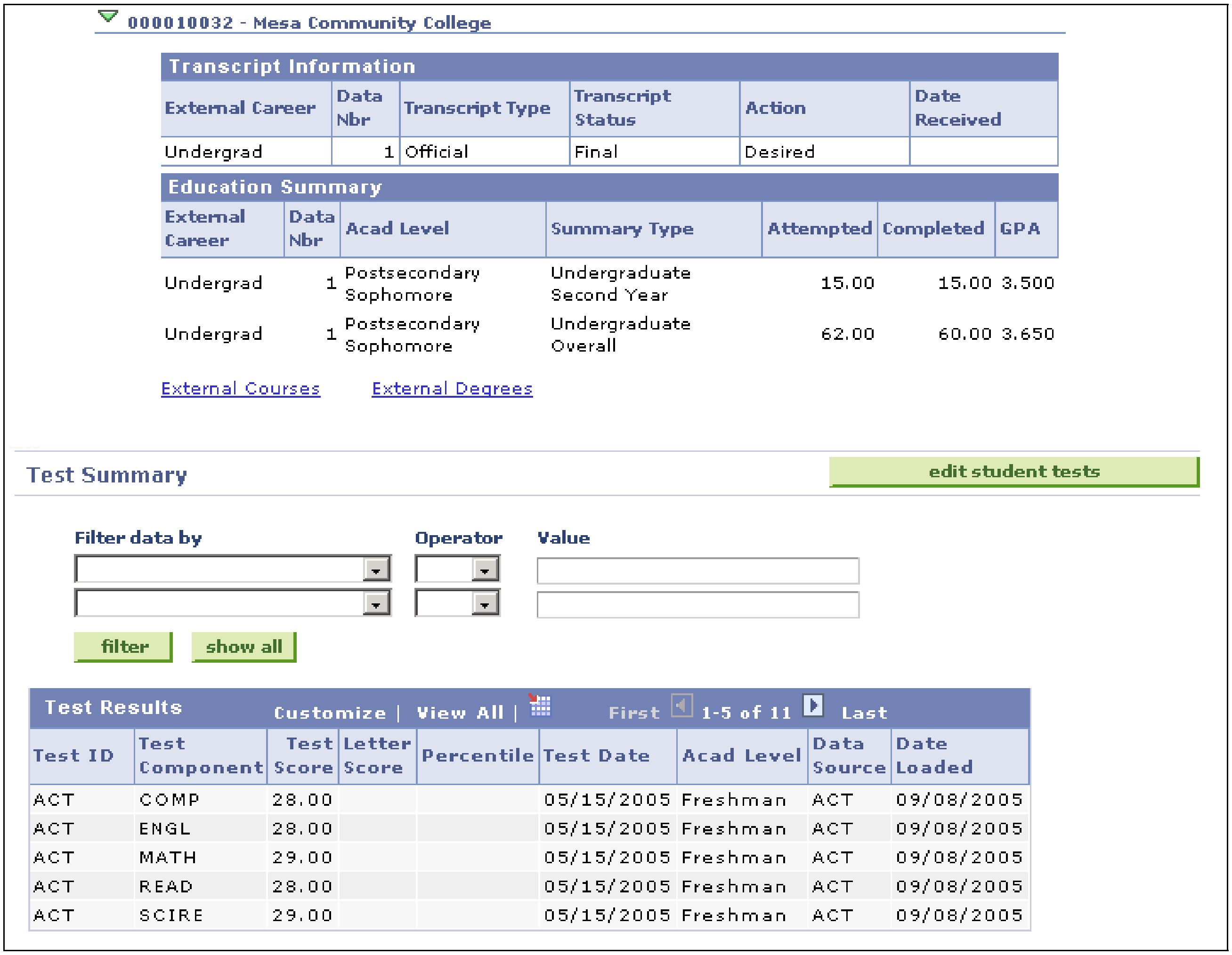
Access the Admissions page (Campus Community, Student Services Center, Admissions).



Admissions page (1 of 3)



Admissions page (2 of 3)



000010032 - Mesa Community College

Transcript Information

External Career	Data Nbr	Transcript Type	Transcript Status	Action	Date Received
Undergrad	1	Official	Final	Desired	

Education Summary

External Career	Data Nbr	Acad Level	Summary Type	Attempted	Completed	GPA
Undergrad	1	Postsecondary Sophomore	Undergraduate Second Year	15.00	15.00	3.500
Undergrad	1	Postsecondary Sophomore	Undergraduate Overall	62.00	60.00	3.650

External Courses External Degrees

Test Summary

edit student tests

Filter data by Operator Value

filter show all

Test Results Customize | View All | First 1-5 of 11 Last

Test ID	Test Component	Test Score	Letter Score	Percentile	Test Date	Acad Level	Data Source	Date Loaded
ACT	COMP	28.00			05/15/2005	Freshman	ACT	09/08/2005
ACT	ENGL	28.00			05/15/2005	Freshman	ACT	09/08/2005
ACT	MATH	29.00			05/15/2005	Freshman	ACT	09/08/2005
ACT	READ	28.00			05/15/2005	Freshman	ACT	09/08/2005
ACT	SCIRE	29.00			05/15/2005	Freshman	ACT	09/08/2005

Admissions page (3 of 3)

This page provides an overview of information from components in the Student Admissions menu. Students can see some of the same information from the self-service Student Admission Application status menu.

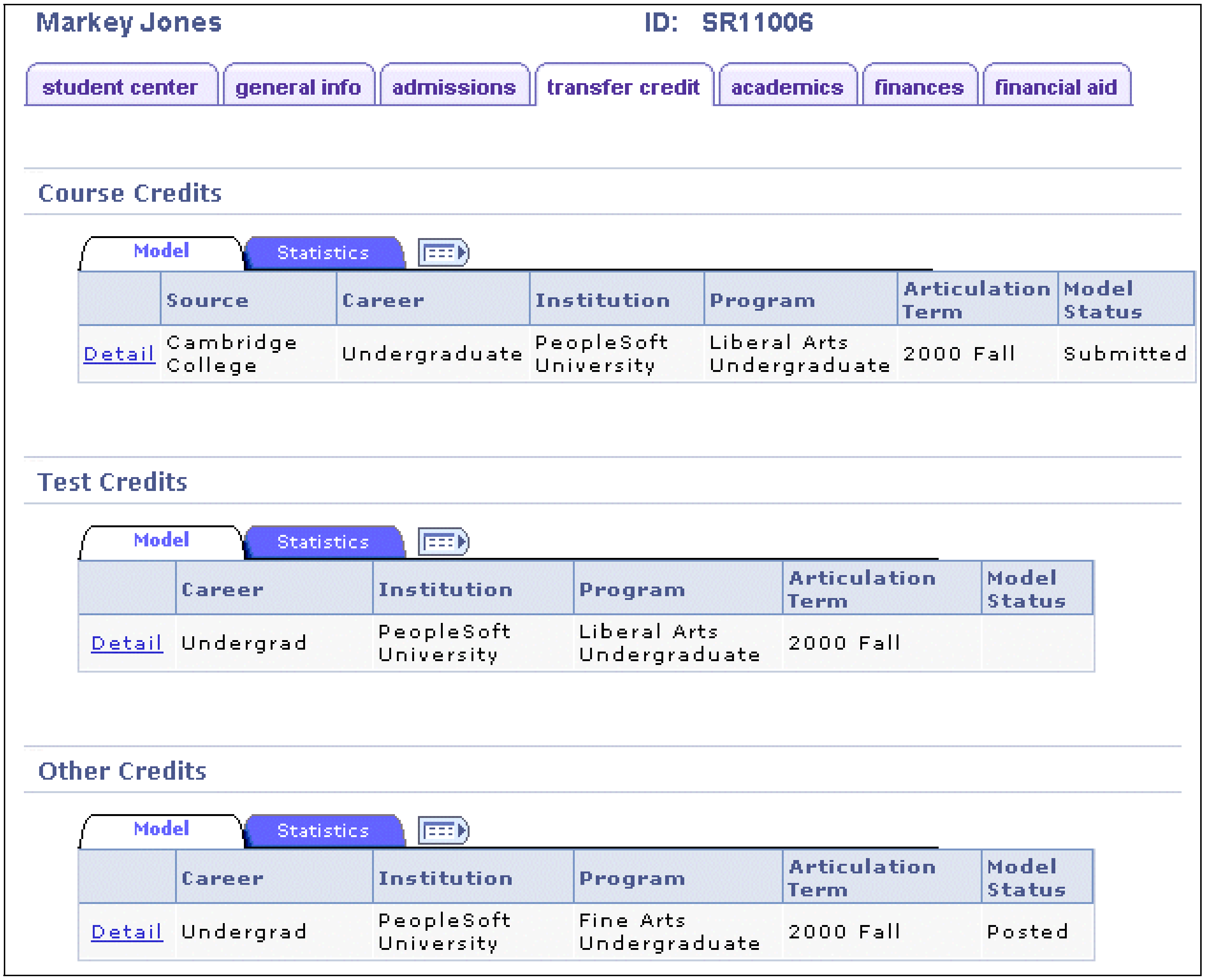
This table lists the actions available on the Admissions page and the core component to which the user is redirected for more detail:

Action Button	***Destination Component and 1st Page***	***Core Navigation***	***Self-Service Navigation***
Edit Application Data	ACAD_HISTORY_PERS ADM_APPL_PROG_MNT	Student Admissions, Application Maintenance, Maintain Applications	Self Service, Student Admission, Application Status
Edit Education Data	ACAD_HISTORY_PERS EXT_ACAD_DATA	Student Admissions, Application Entry, Academic Information, Education or Records and Registration, Transfer Credit Evaluation, External Education	None

Action Button	*Destination Component and 1st Page*	*Core Navigation*	*Self-Service Navigation*
Edit Student Tests	ACAD_TST_RSLT_PERS STDNT_TEST_SCORE	Student Admissions, Application Entry, Academic Information, Test Results	None

Viewing a Student's Transfer Credit Information

Access the Transfer Credit page (Campus Community, Student Services Center, Transfer Credit).

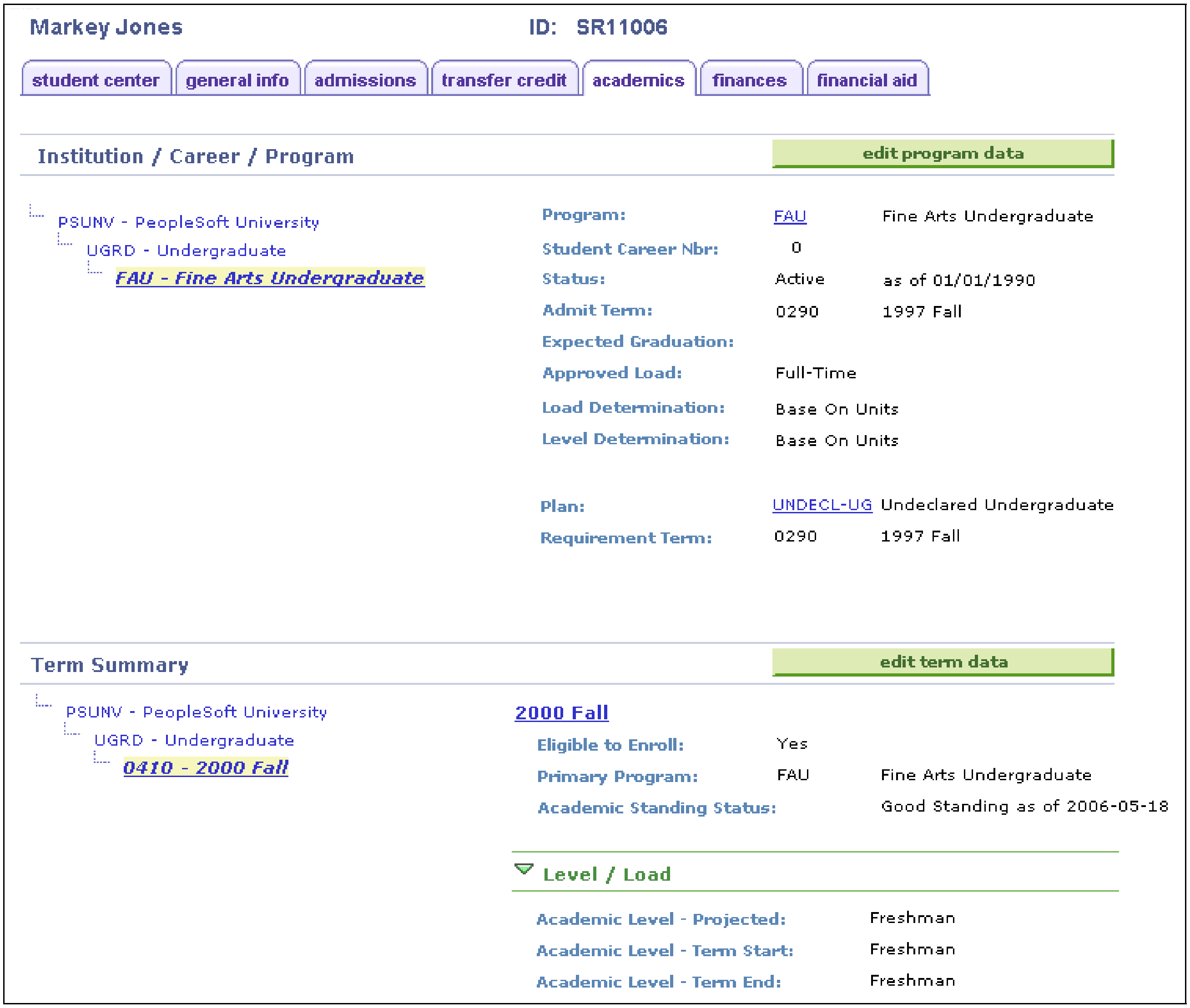


Transfer Credit page

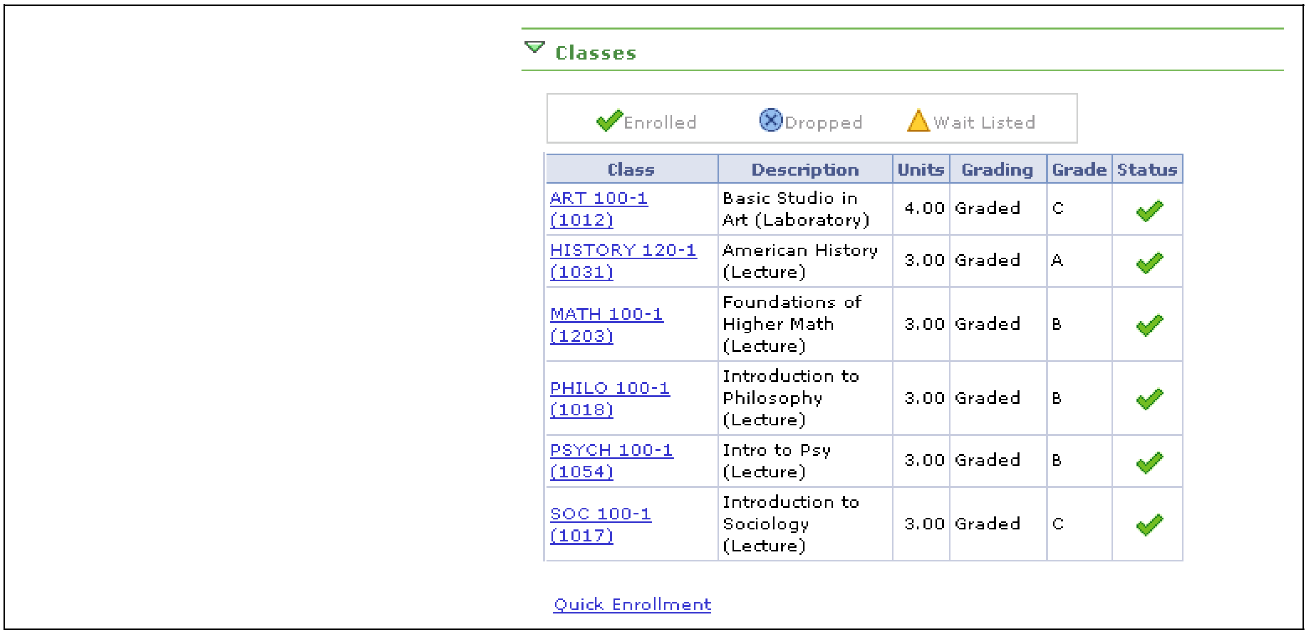
This page provides an overview of information from components in the Records and Enrollment menu. Students can also see some of the same information from the self-service View Transfer Credit Report menu.

Viewing a Student's Academics Information

Access the Academics page (Campus Community, Student Services Center, Academics).



Academics page (1 of 3)



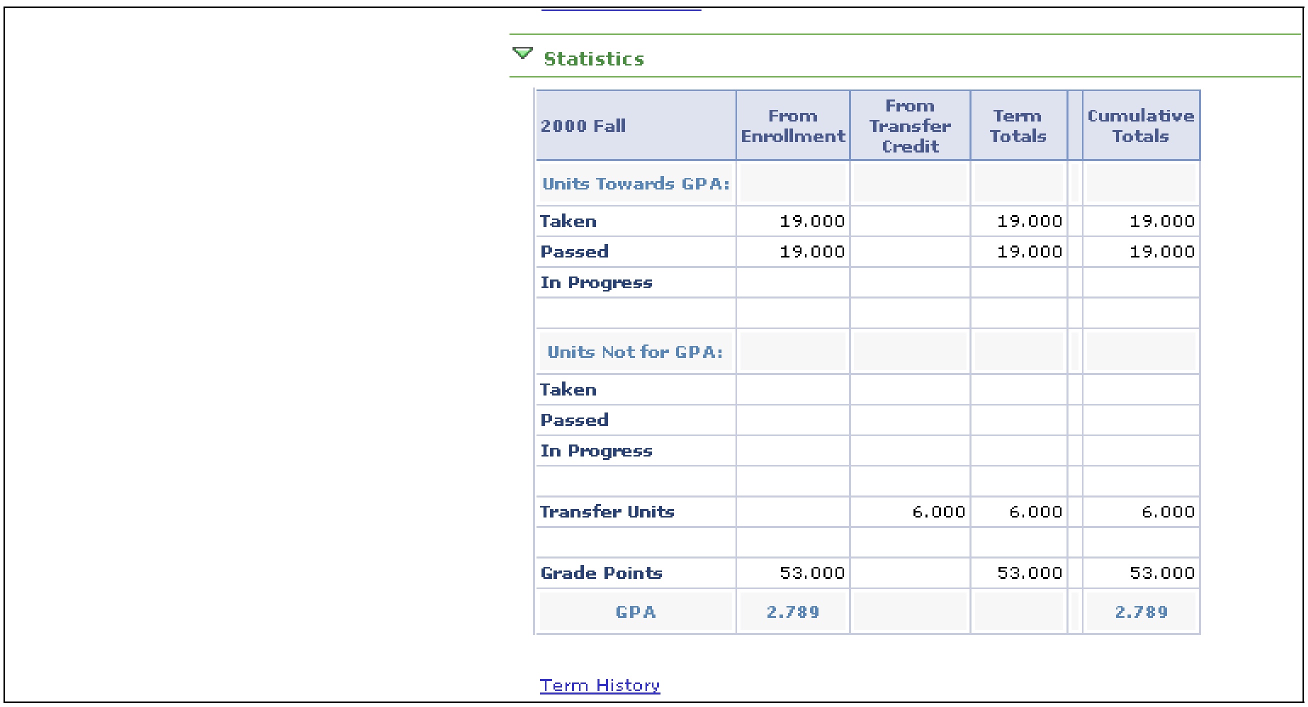
Classes

Enrolled Dropped Wait Listed

Class	Description	Units	Grading	Grade	Status
ART 100-1 (1012)	Basic Studio in Art (Laboratory)	4.00	Graded	C	✓
HISTORY 120-1 (1031)	American History (Lecture)	3.00	Graded	A	✓
MATH 100-1 (1203)	Foundations of Higher Math (Lecture)	3.00	Graded	B	✓
PHILO 100-1 (1018)	Introduction to Philosophy (Lecture)	3.00	Graded	B	✓
PSYCH 100-1 (1054)	Intro to Psy (Lecture)	3.00	Graded	B	✓
SOC 100-1 (1017)	Introduction to Sociology (Lecture)	3.00	Graded	C	✓

Quick Enrollment

Academics page (2 of 3)



Statistics

2000 Fall	From Enrollment	From Transfer Credit	Term Totals	Cumulative Totals
Units Towards GPA:				
Taken	19.000		19.000	19.000
Passed	19.000		19.000	19.000
In Progress				
Units Not for GPA:				
Taken				
Passed				
In Progress				
Transfer Units		6.000	6.000	6.000
Grade Points	53.000		53.000	53.000
GPA	2.789			2.789

Term History

Academics page (3 of 3)

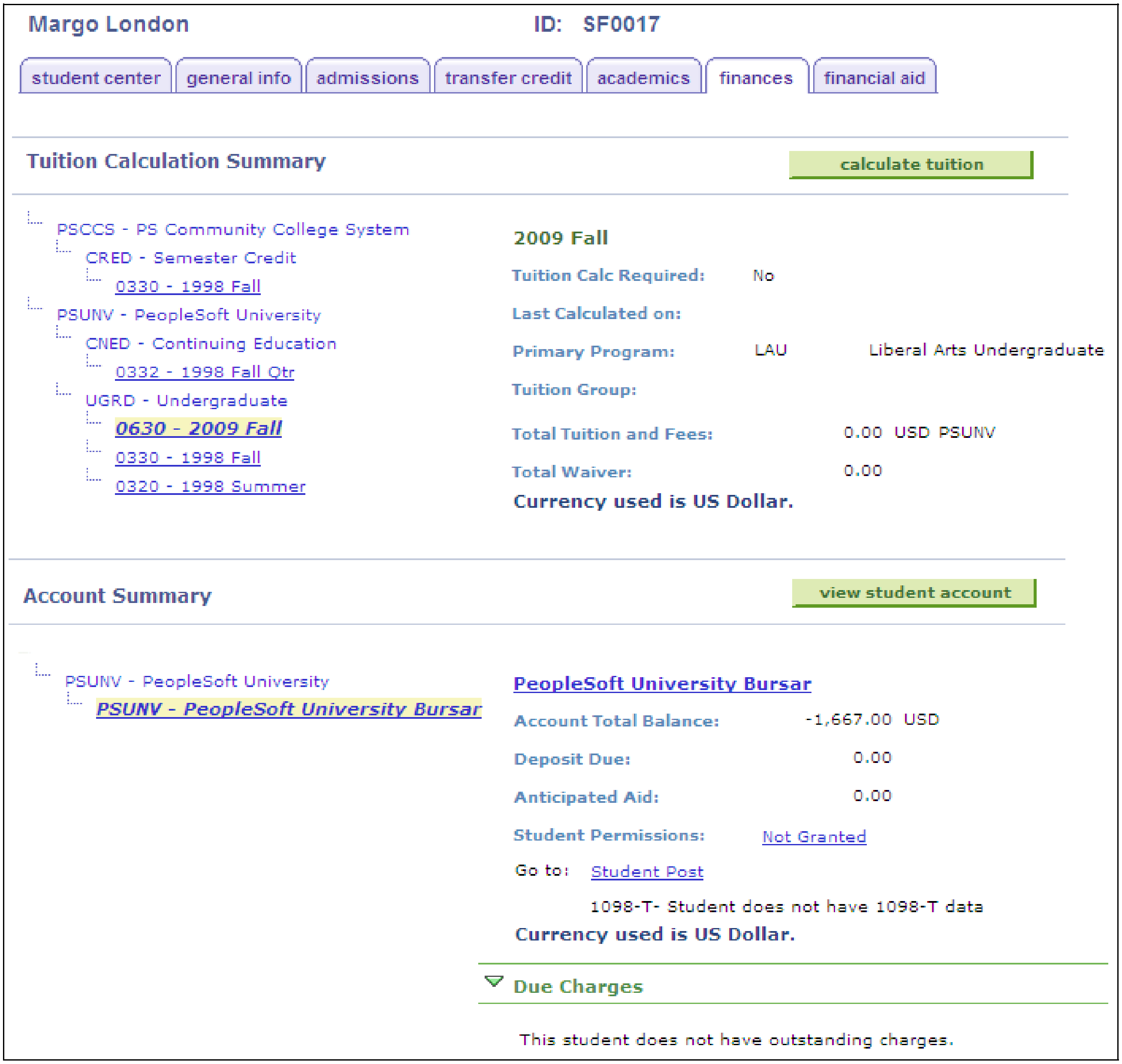
This page provides an overview of information from components in the Records and Enrollment menu. Students cannot see this information from PeopleSoft Campus Self Service.

This table lists the actions available on the Academics page and the core component to which the user is redirected for more detail:

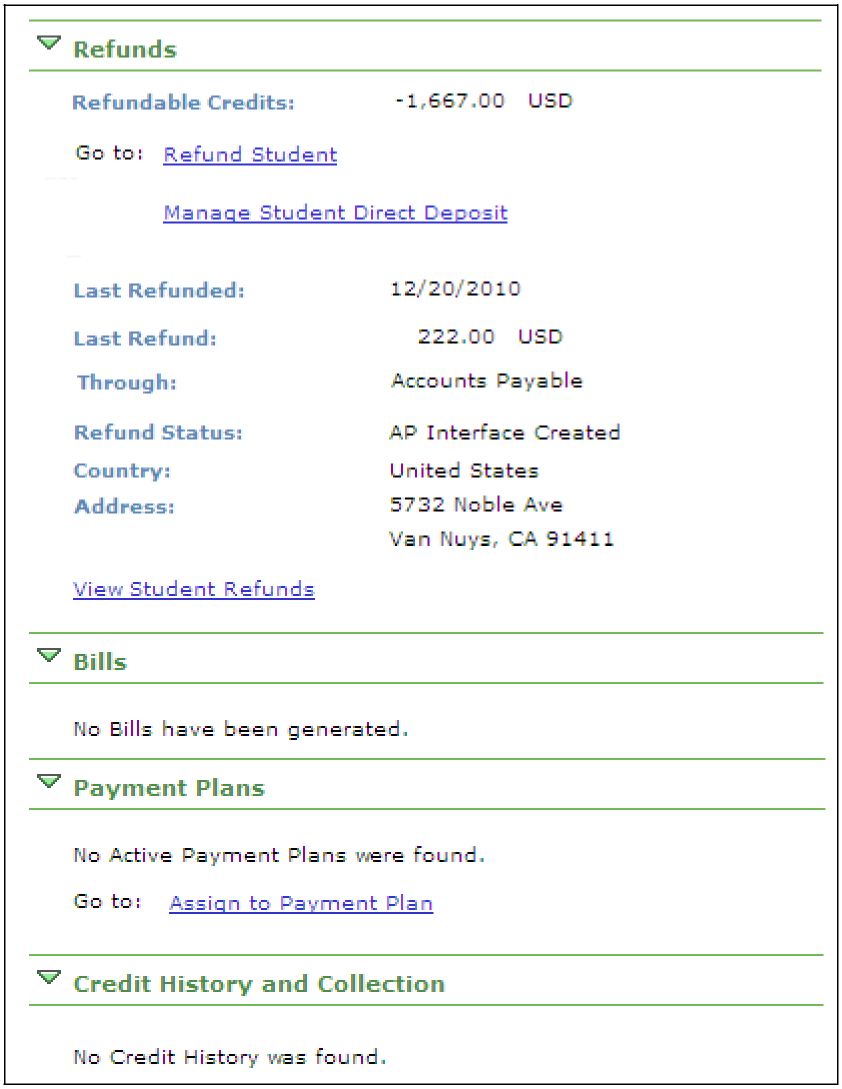
Action Button	***Destination Component and 1st Page***	***Core Navigation***	***Self-Service Navigation***
Edit Student Program Data	ACAD_PLAN STDNT_PROG	Records and Enrollment, Career and Program Information, Student Program/Plan	None
Edit Student Term Data	STDNT_ACTIVATION STDNT_ACTIVATION	Records and Enrollment, Student Term Information, Term Activate a Student, Term Activation	None

Viewing a Student's Self-Service Finances Information

Access the Finances page (Campus Community, Student Services Center, Finances).



finances page (1 of 2)



finances page (2 of 2)

Using the Finances Page

This page provides an overview of information from components in the Student Financials menu. Students cannot see this information from PeopleSoft Campus Self Service.

This table lists the actions available on the Finances page and the core component to which the user is redirected for more detail:

Action Button	*Destination Component and 1st Page*	*Core Navigation*	*Self-Service Navigation*
Calculate Tuition	TUITION_CALC STDNT_TUITION_CALC	Student Financials, Tuition and Fees, Tuition Calculation	None
View Student Account	ACCOUNT_VW ACCOUNT_SF	Student Financials, View Customer Accounts	None

1098–T

The 1098–T link appears only for US institutions—the institution that appears in the Account Summary section of the finances page must have a value of *USA* in the Country field on the Academic Institution 1 page.

For US institutions, the link appears:

- Only if the Use Electronic Statements check box on the 1098–T TIN Detail setup page is selected.
- Only for students for whom 1098–T data has been generated.

If the Use Electronic Statements check box is not selected on the setup page, a message appears instead of the 1098–T link on the finances page: *1098-T- TIN is not set to Use Electronic Statement.*

If 1098–T data is not available for a student, a message appears instead of the 1098–T link on the finances page: *1098-T- Student does not have 1098-T data.*

Click the 1098–T link to access the (Review 1098–T Data) 1098–T Data page. The page displays the most recent 1098–T data for the student in context—that is, the maximum sequence number in the 1098–T Status group box.

On the 1098–T Data page, click the View 1098–T link to retrieve a 1098–T .pdf of the most recent 1098–T data.

The link is sensitive to the context in the 1098-T Status scroll area—that is, the .pdf is generated using the data in context.

Manage Student Direct Deposit

Click the Manage Student Direct Deposit link to access the Manage Student Direct Deposit page with the context of student.

Note. The Search page does not appear.

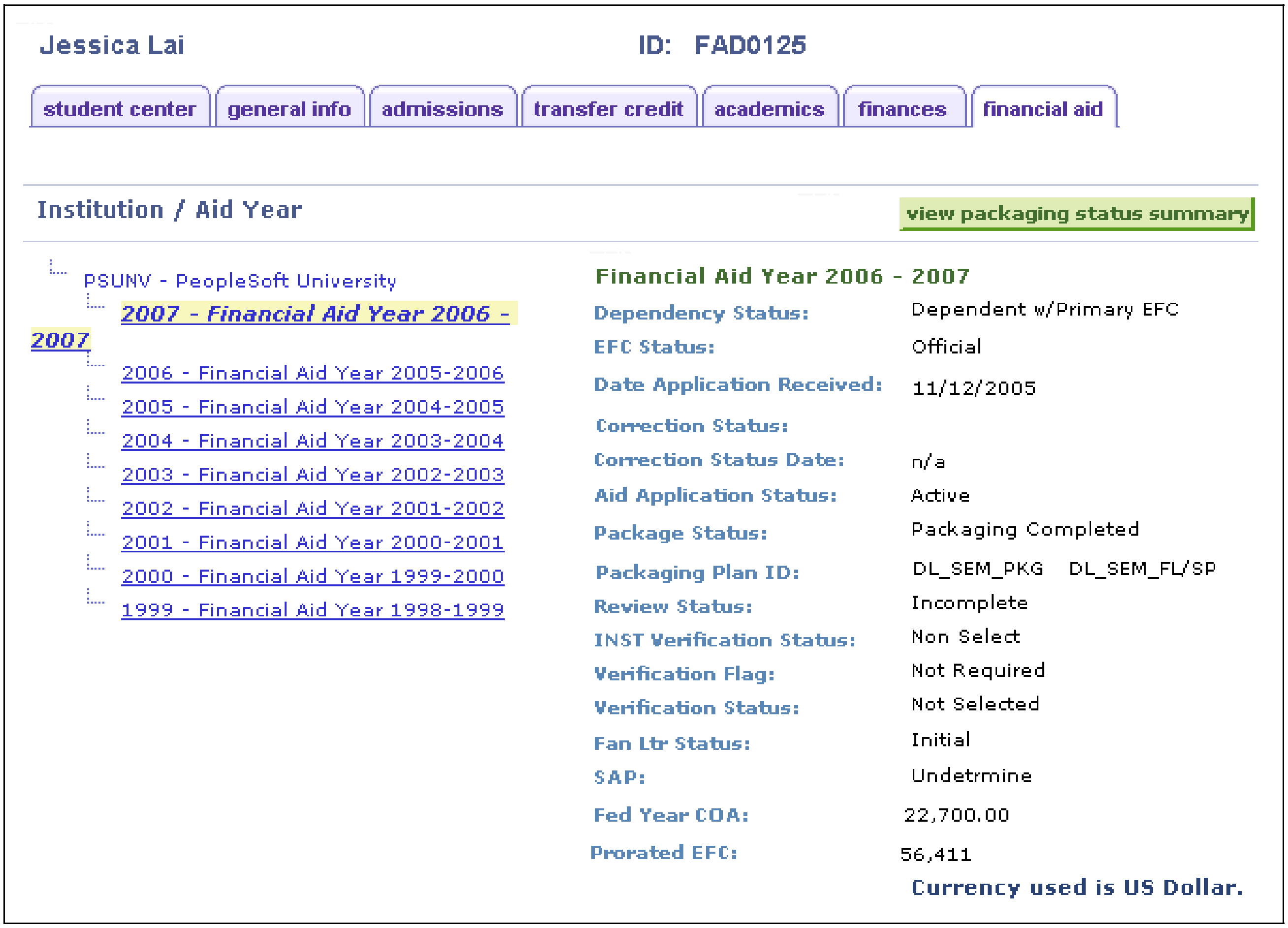
Use the Manage Student Direct Deposit page to set up and edit direct deposit distributions for AP refunding for a student.

The Manage Student Direct Deposit link appears only if the Refund Method value on the Refund Setup page is *A/P* and the Use Single Payment Voucher option is selected in the AP Refunding Option group box on the SF Installation page.

Unlike the Enroll in Direct Deposit link in Student Center, this link is *not* dependent on SF Institution Set setup.

Viewing a Student's Self-Service Financial Aid Information

Access the Financial Aid page (Campus Community, Student Services Center, Financial Aid).



Jessica Lai ID: FAD0125

student center | general info | admissions | transfer credit | academics | finances | financial aid

Institution / Aid Year

view packaging status summary

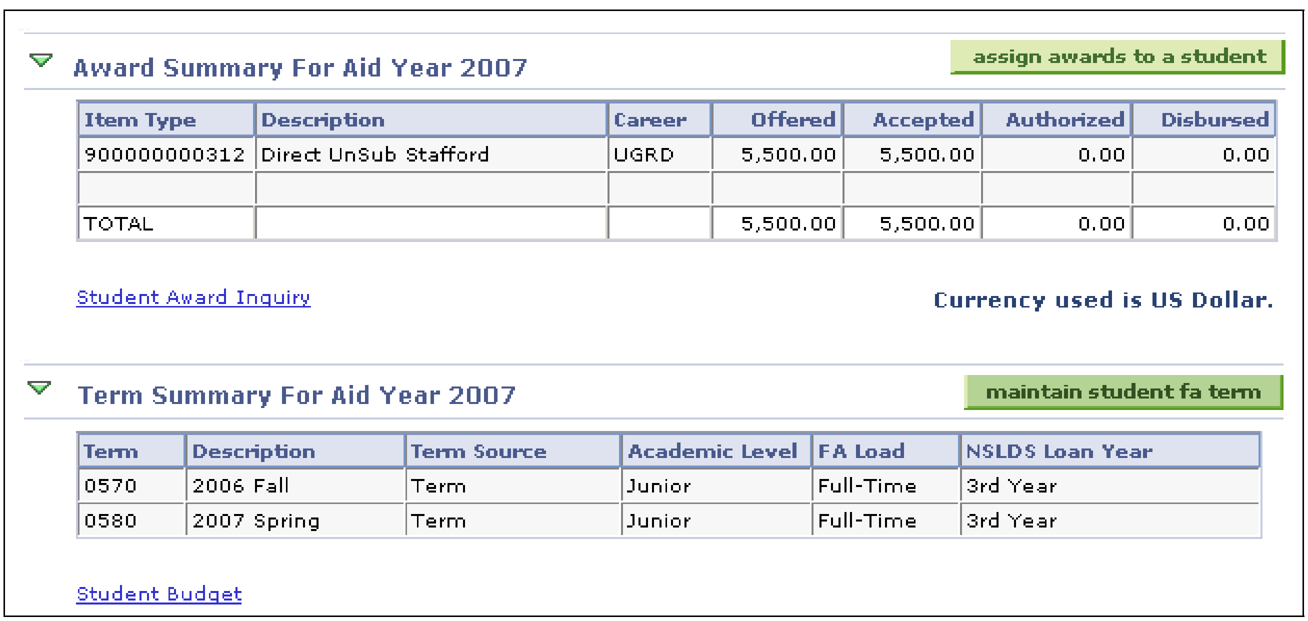
PSUNV - PeopleSoft University
2007 - Financial Aid Year 2006 - 2007
2006 - Financial Aid Year 2005-2006
2005 - Financial Aid Year 2004-2005
2004 - Financial Aid Year 2003-2004
2003 - Financial Aid Year 2002-2003
2002 - Financial Aid Year 2001-2002
2001 - Financial Aid Year 2000-2001
2000 - Financial Aid Year 1999-2000
1999 - Financial Aid Year 1998-1999

Financial Aid Year 2006 - 2007

Dependency Status:	Dependent w/Primary EFC
EFC Status:	Official
Date Application Received:	11/12/2005
Correction Status:	
Correction Status Date:	n/a
Aid Application Status:	Active
Package Status:	Packaging Completed
Packaging Plan ID:	DL_SEM_PKG DL_SEM_FL/SP
Review Status:	Incomplete
INST Verification Status:	Non Select
Verification Flag:	Not Required
Verification Status:	Not Selected
Fan Ltr Status:	Initial
SAP:	Undetrmine
Fed Year COA:	22,700.00
Prorated EFC:	56,411

Currency used is US Dollar.

Financial Aid page (1 of 2)



Award Summary For Aid Year 2007

assign awards to a student

Item Type	Description	Career	Offered	Accepted	Authorized	Disbursed
900000000312	Direct UnSub Stafford	UGRD	5,500.00	5,500.00	0.00	0.00
TOTAL			5,500.00	5,500.00	0.00	0.00

Student Award Inquiry

Currency used is US Dollar.

Term Summary For Aid Year 2007

maintain student fa term

Term	Description	Term Source	Academic Level	FA Load	NSLDS Loan Year
0570	2006 Fall	Term	Junior	Full-Time	3rd Year
0580	2007 Spring	Term	Junior	Full-Time	3rd Year

Student Budget

Financial Aid page (2 of 2)

This page provides an overview of information from components in the Financial Aid menu. Students cannot see this information from PeopleSoft Campus Self Service.

This table lists the actions available on the Financial Aid page and the core component to which the user is redirected for more detail:

Action Button	***Destination Component and 1st Page***	***Core Navigation***	***Self-Service Navigation***
View Packaging Status Summary	STDNT_AID_PACKAGE STDNT_AID_PACKAGE	Financial Aid, View Packaging Status Summary, Financial Aid Status	None
Assign Awards to a Student	AWARD_ENTRY_MC STDNT_AWARD_ENTRY3	Financial Aid, Awards, Awards Processing, Assign Awards to a Student, Student Aid Package	None
Maintain Student FA Term	STDNT_FA_TERM STDNT_FA_TERM	Financial Aid, Financial Aid Term, Maintain Student FA Term, FA Term	None

Chapter 52

Adding Organizations to Your Database

This chapter provides an overview of organizations and discusses how to:

- Create organization records.
- Enter regional data.
- Enter school-related data.
- Enter affiliations with organizations.

Understanding Organizations

Organizations can include high schools, colleges or universities, community or civic groups, government entities, test and transcript data companies, office supply vendors, and so on. You can create a record for each organization and enter the location of the organization with telephone numbers and electronic addresses. You can enter persons at the organization with whom your institution maintains contact and specify the primary location, department, and contact person that your institution should use.

For schools, you can identify the subjects and courses that they offer, the types of transcripts they generate, and their term, grading, and credit structure. Maintaining this information helps to convert their information into an equivalent at your institution so you can evaluate it according to your requirements.

After you set up group types, contact types, and external subjects, terms, and courses, you can add organizations to your database and select from those items to help describe or identify each organization.

To add an organization to your system, create an organization record on the Organization Table page. When you enter data and save the record, the system assigns the next available sequential organization ID to that organization and adds the record to your database. That ID remains associated with the organization unless you change or delete it. You can use the organization name or its unique ID to access the record and update the organization information and specify primary contacts, locations, departments and so on.

Important! When you save the new organization record, the system does not notify you if a duplicate organization already exists. The system assigns the ID and adds the organization. To avoid creating duplicate records, configure the system to notify you of duplicates by using Search/Match to determine if an organization with the same data already exists in your database before adding the new one.

When an organization is a supplier, you can identify it as a vendor and make note of the taxpayer identification number (TIN).

When an organization is also a school or other institution that offers courses, you can identify and track the subject areas that the organization offers and the specific courses that it offers within that subject area. Maintaining subject and course data is especially valuable when evaluating transcripts from other institutions.

You can identify items that are important to your institution's academic affiliations with organizations, including their grading structure and the types of transcripts that they generate. Maintaining this information helps you convert their information into an equivalent at your institution so that you can evaluate.

Warning! Before adding organizations or entering and updating data about them, you must be familiar with PeopleSoft applications, including the *Add, Update/Display, Include History,* and *Correct History* modes and the PeopleSoft system's method of applying effective dates with active or inactive status.

See *PeopleTools: PeopleSoft Applications User's Guide, "Understanding Effective Dates"*

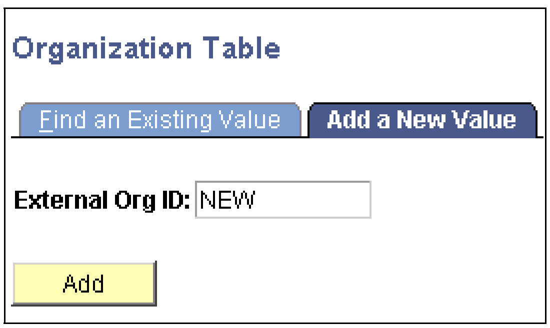
To create an organization record:

1. Select Campus Community, Organization, Create/Maintain Organizations, Organization Table.
2. Click the Add a New Value link at the bottom of the Organization Table - Find an Existing Value search page.

   The Organization Table - Add a New Value search page appears with *NEW* in the External Org ID field.
3. Click the Add button.

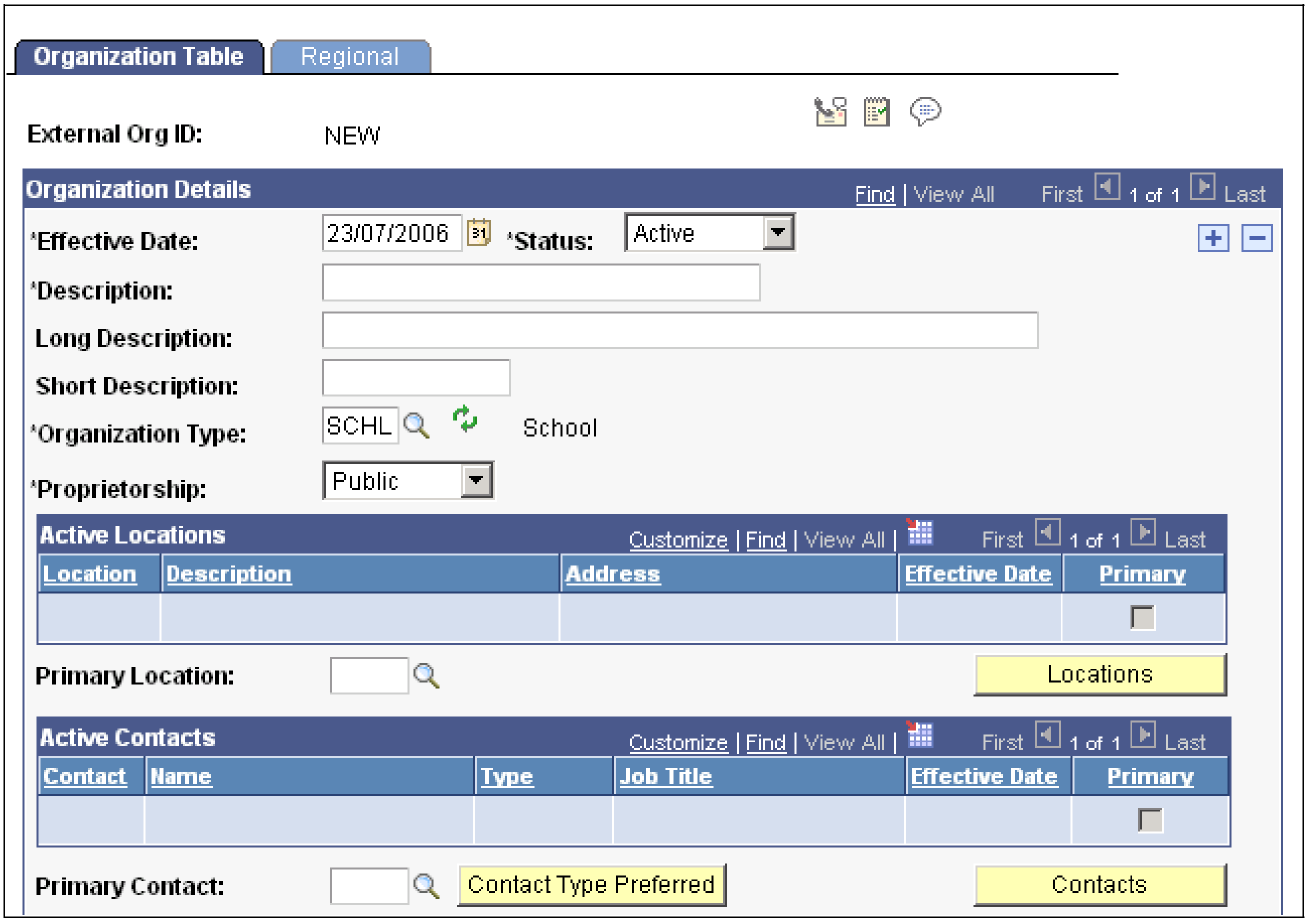
   The Organization Table page appears with ID of *NEW.*

Warning! If you overwrite the word *NEW* in the External Org ID field on the Organization Table - Add a New Value and manually enter an ID for the organization that you are adding, you disrupt the system's autonumbering sequence. A system administrator might need to intervene to correct the situation.

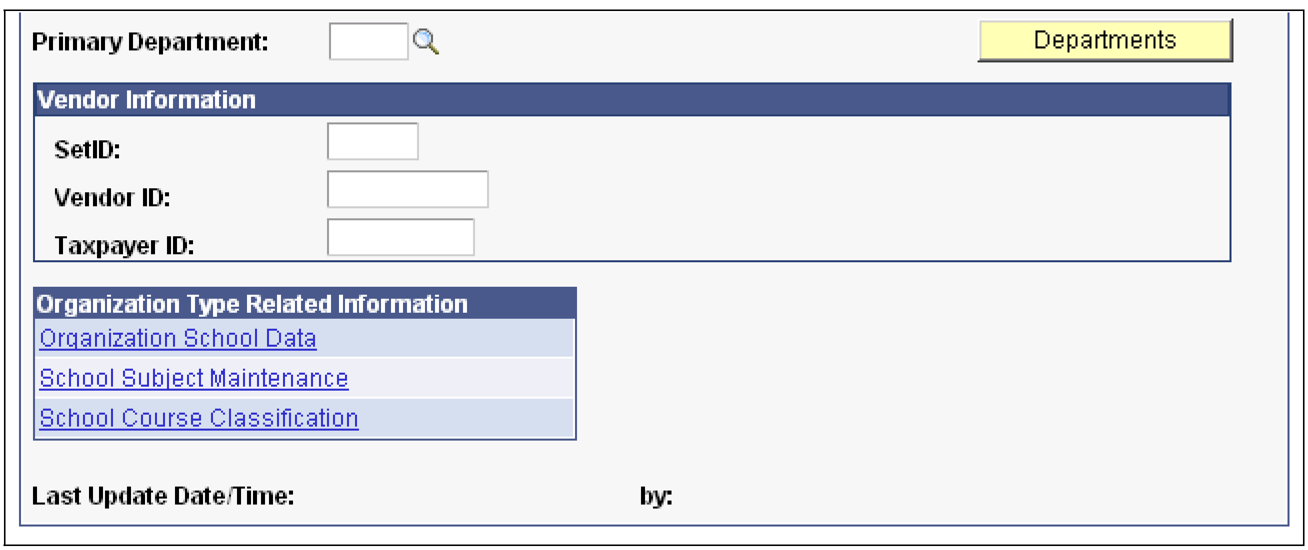


Example of the Organization Table - Add a New Value search page

This example shows the Organization Table page when you are adding a new record for a school:



Example of adding a new record on the Organization Table page (1 of 2)



Example of adding a new record on the Organizational Table page (2 of 2)

Note. The links displayed in the Organization Type Related Information group box are determined by the Organization Type you enter. If links are not defined as part of the organization type setup, such as *Student Financials*, *Third Party*, or *Other*, the Organization Type Related group box will not appear on the Organization Table page.

1. Enter at least the required data (Effective Date, Status, Description, Organization Type, and Proprietorship) in the Organization Details group box on the Organization Table page to add the new record.

   Warning! If you select Save before completing the required data, you must use the Correct History mode to continue entering or modifying the effective-dated data.

2. Select Save.

   The system assigns the next available unique organization ID to the record and adds it to your database.

Creating Organization Records

This section lists prerequisites and discusses how to:

- Identify the organization.
- Identify the organization as a school.
- Identify the organization as a nonprofit, business, or foundation.

Prerequisites

Before adding an organization to the database, set up organization groups and types. If the organization is a school, also make sure that external subjects and terms are set up.

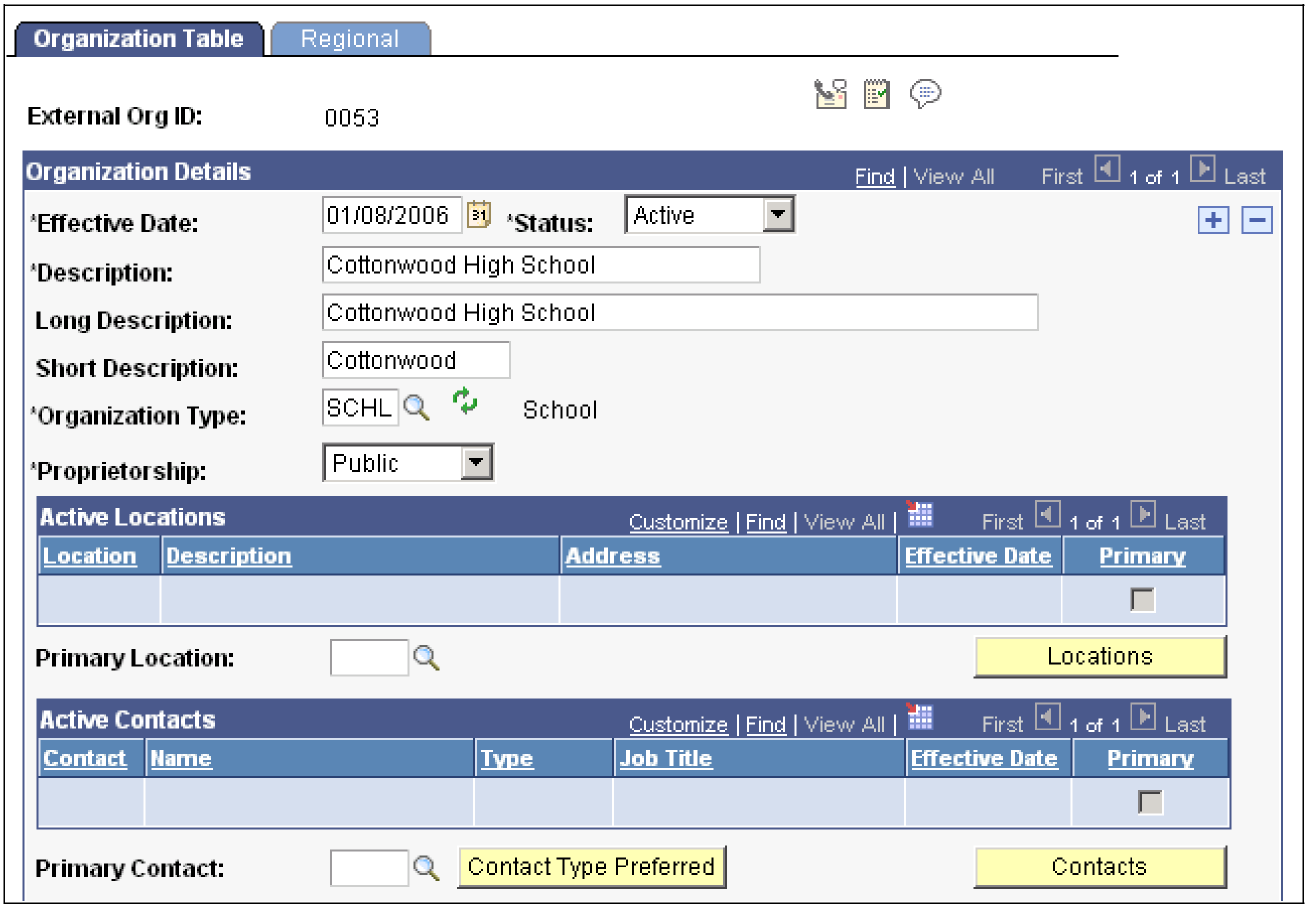
Pages Used to Create Organization Records

Page Name	***Definition Name***	***Navigation***	***Usage***
Organization Table	EXT_ORG_TABLE	• Campus Community, Organization, Create/Maintain Organizations, Organization Table • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Table • Student Admissions, Internship Contracts NLD, Organizations	Identify the organization.
School Data	SCC_EXT_ORG_ADM	Campus Community, Organization, Create/Maintain Organizations, Organization School Data	Enter data that applies to an organization that offers courses.
Foundation	AV_ORG_FND_INFO	• Click the Foundation Information link on the Organization Table page. • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Foundation Info, Foundation	Enter data that applies to an organization that is a foundation that issues grants.

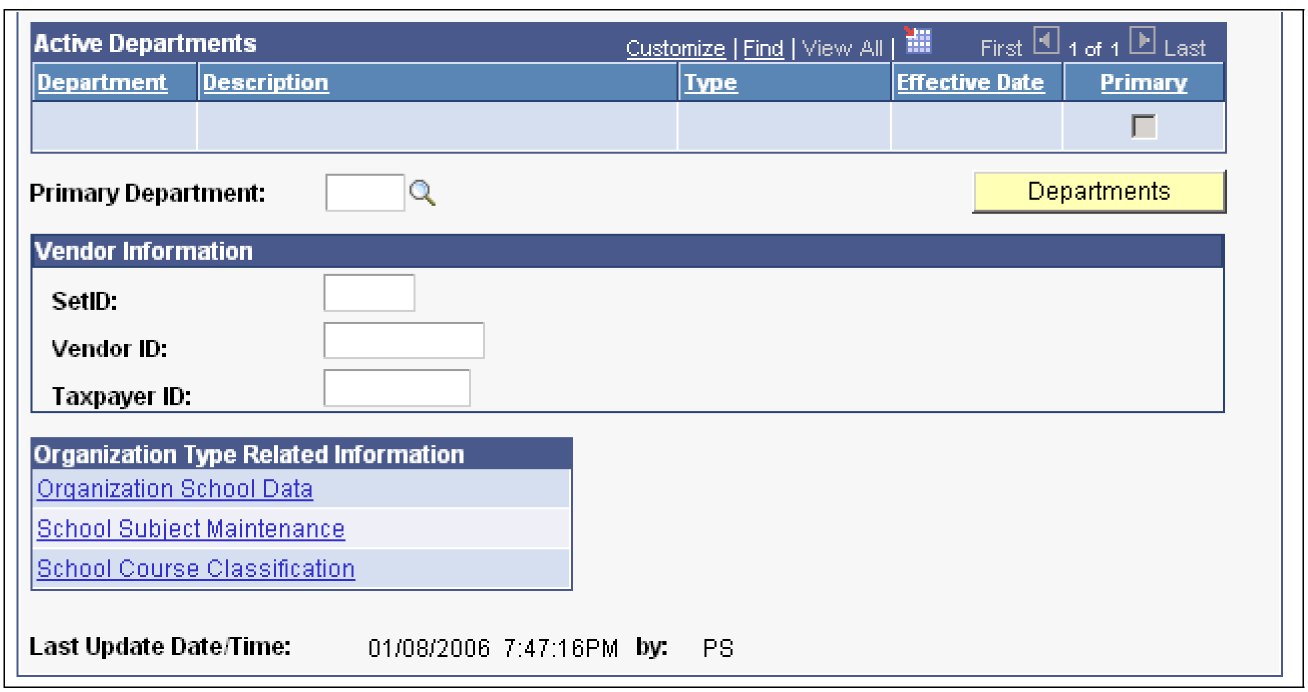
Page Name	***Definition Name***	***Navigation***	***Usage***
Support Areas	AV_ORG_FND_SUPP	• Click the Foundation Areas of Support link on the Organization Table page. • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Foundation Info, Support Areas	Enter data regarding a foundation's areas of interest and support.
Proposal Info	AV_ORG_FND_PROP	• Click the Foundation Proposal Info link on the Organization Table page. • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Foundation Info, Proposal Info	Enter data regarding submitting proposals to the foundation.
Organizational Financial Info	AV_ORG_FIN_INFO	• Click the Org Fin Info/Constituent Type link on the Organization Table page. • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Financial Info	Enter financial data regarding a business, foundation, or nonprofit organization.

Identifying the Organization

Access the Organization Table page (Campus Community, Organization, Create/Maintain Organizations, Organization Table).



Organization Table page (1 of 2)



Organization Table page (2 of 2)

Note. When you create the record for the first time and you enter a description in the Description field and exit the field, the system automatically enters *Long Description, Short Description,Organization Type,* and *Proprietorship* field values. You can override these values.

Organization Details

Organization Type

Enter the type of organization (for example *BUSN* (Business), *FNDN* (Foundation), *SFTP* (Student Financials Third Party), *NONP* (Non-Profit), or *SCHL (School)* that describes this organization.

Values for this field are set up when you define the organization type.

Proprietorship

Enter the type of primary owner or funding source *(Other, Private, Public,* or *Religious)* of this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Note. If you change the organization type, you must refresh the Organization Table page so that the links associated with the organization type appear in the Organization Type Related Information group box.

Active Locations

If you are creating this organization record for the first time, primary locations are unavailable. You can assign a primary location after you have set up locations on the Location Detail page, then from the Organization Table page for the locations entered you can select the primary location.

Primary Location

Click to access the Primary Location Look Up page where you can enter the primary location for the organization.

When selected, the information associated with the primary location appears first in the list with the Primary check box selected.

Locations

Click to access the Location Detail pages where you can enter the organization's locations.

All active locations appear in the Active Locations group box.

Active Contacts

If you are creating this organization record for the first time, primary contact persons are not available. You must assign contacts to the organization on the Contact Detail page, then from the Organization Table page for the contacts entered you can select the primary contact and enter the preferred contact type. For each Contact Type such as Academic Advisor, Guidance Counselor, Proposal Coordinator, there may be multiple contacts. The user can indicate the Preferred Contact for each Contact Type of the organization. This is different then the Primary Contact which is the single, main contact for the organization. However, a Preferred Contact and a Primary Contact could be the same person. For example: Jane Smith is selected as the Preferred Contact for all Contact Type — Academic Advisors for Cottonwood High School Joe Franklin is selected as the Preferred Contact for all Contact Type — Guidance Counselors for Cottonwood High School. Jane Smith is also the Primary Contact for the Cottonwood High School.

Primary Contact	Select a primary contact. When selected, the information associated with the primary contact appears first in the list with the Primary check box selected.
Contact Type Preferred	Click the Contact Type Preferred button to access the Contact Type Preferred page and enter the contact type.
Contacts	Click the Contacts button to access the Contact Detail pages where you can enter the contacts for the organization. All active contacts are listed in the Active Contacts group box.

Active Departments

If you are creating this organization record for the first time, primary departments are not available. You must assign department to the organization on the Department Detail page, then from the Organization Table page for the departments entered you can select the primary department.

Primary Department	Enter the primary location for the organization. When selected, the information associated with the primary department appears first in the list with the Primary check box selected.
Departments	Click the Departments button to access the Department pages where you can view or enter the departments for the organization. All active departments are listed with the Active Departments group box.

Vendor Information

SetID	Enter the setID of the department at your institution that does business with or is responsible for paying the bills from this vendor.
Vendor ID	Enter the vendor ID, the number or other descriptor that your institution uses for this vendor.
Taxpayer ID	Enter the taxpayer ID, this vendor's taxpayer identification number.

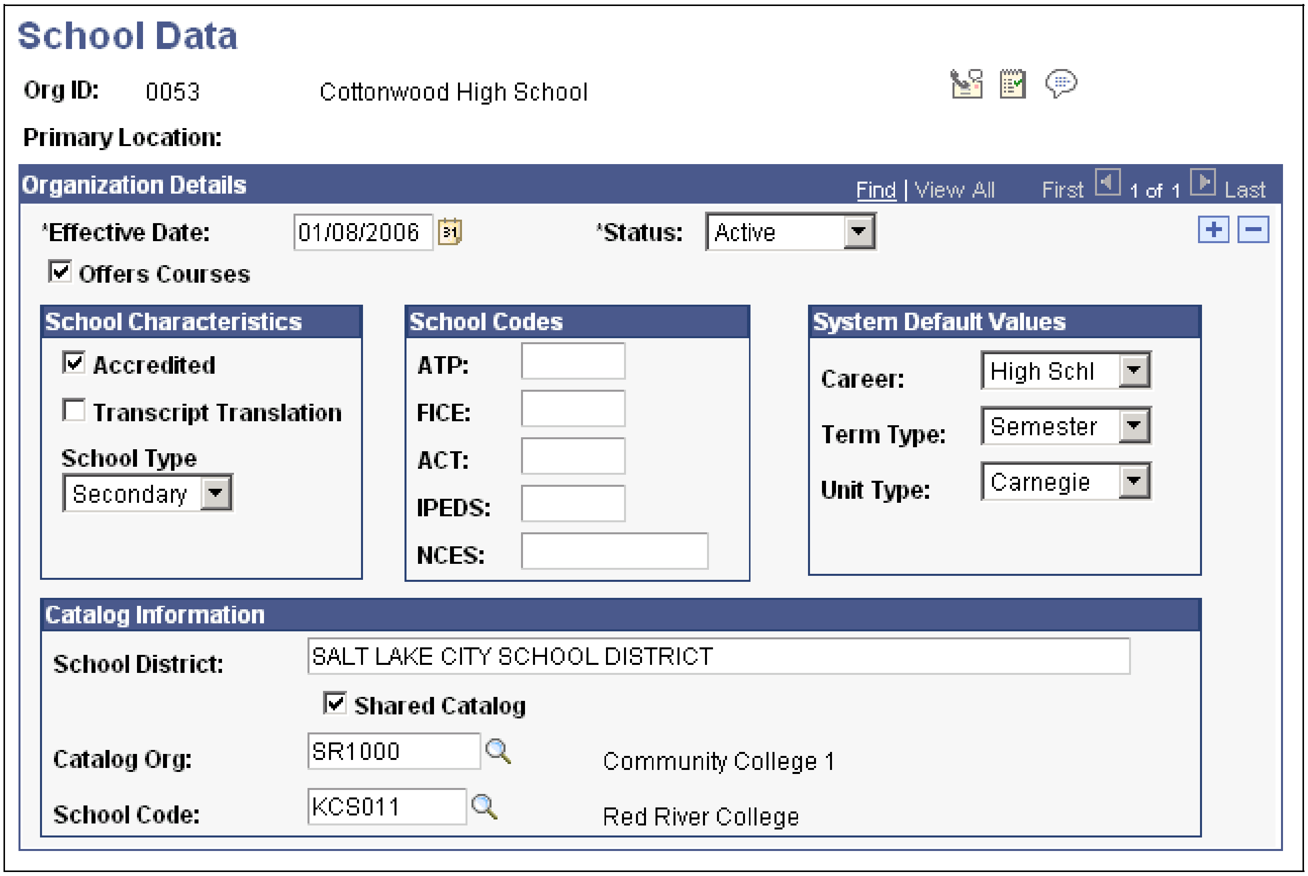
Organization Type Related Information

This table lists the organization type related information that displays for each organization type. Clicking the link enables you to access the pages where you can enter data about the type of organization. If you change the organization type from the school to another organization type, you must refresh the organization Table page so that the links associated with the organization type appear in the Organization Type Related Information group box.

Organization Type	***Links***
SCHL (School)	Organization School Data School Subject Maintenance School Course Classification
SFTP (Student Financials Third Party)	(None)
KNCT (Knowledge Center)	Organization School Data
NONP (Non-Profit)	Organization Financial Info
OTHR (Other)	(None)
BUSN (Business)	Organization Financial Info
FNDN (Foundation)	Foundation Information Foundation Areas of Support Foundation Proposal Info Org Fin Info/Constituent Type

Identifying the Organization as a School

Access the School Data page (Campus Community, Organization, Create/Maintain Organizations, Organization School Data).



School Data page

Organization Details

Offer Courses Select to indicate that this organization offers courses, whether or not the course offerings are central to the organization's mission.

School Characteristics

Accredited Select to indicate that this school is accredited.

Transcript Translation Select to indicate that transcripts from this school are in a foreign language and must be translated.

School Type Enter the type that describes this school.

Warning! You must use the School Type Table setup page in the LS_SCHL_TYPE_TABLE component (Set Up SACR, Common Definitions, External Education, School Type Table) to set up or modify school type values for Campus Solutions pages. HRMS also uses school types, but these are defined inside the SCHOOL_TYPE_TBL record in the SCHOOL_TYPE_TBL page of the SCHOOL_TYPE_TABLE component. If you modify or add values in the HRMS table, you will not see the changes on the Campus Solutions pages.

School Codes

Enter the appropriate codes for this school.

System Default Values

Career Displays the career level that is associated with this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Term Type Displays the term type that is associated with this organization.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Unit Type Displays the credit or term type that further describes the term type associated with this organization.

PeopleSoft Recruiting and Admissions uses this field for information only. For example, your admissions office might describe the external term as having a *Quarter* term unit type with a *No Credit* unit type value.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Catalog Information

School District Enter the district in which this organization is located.

Shared Catalog Select to indicate that this organization participates in a shared catalog with another school.

Catalog Org (catalog organization) Enter the secondary school with which this organization shares a catalog.

School Code Enter the code for the higher education institution with which this organization shares a catalog.

Identifying the Organization as a Non-Profit, Business, or Foundation

If your institution has licensed and implemented PeopleSoft Campus Solutions Contributor Relations, you can access the Foundation, Support Areas, and Proposal pages to set up an organization as a foundation. You can also access the Financial Information page to enter financial information about a foundation, business, or nonprofit organization.

Entering Regional Data

An organization's regional information includes the North American Industry Classification System (NAICS) codes for North America and OUAC data for Canada.

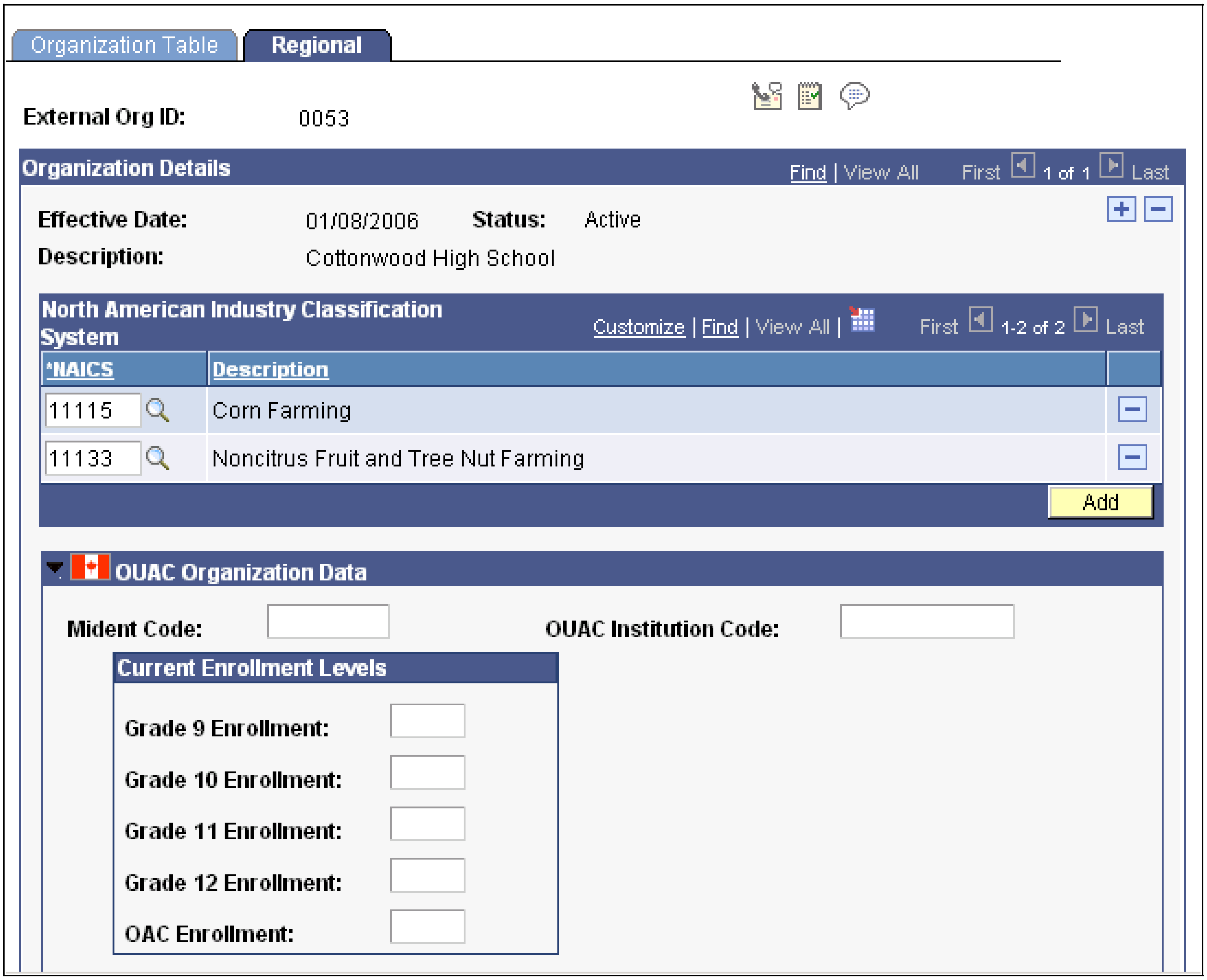
This section discusses how to enter regional data.

Page Used to Enter Regional Data

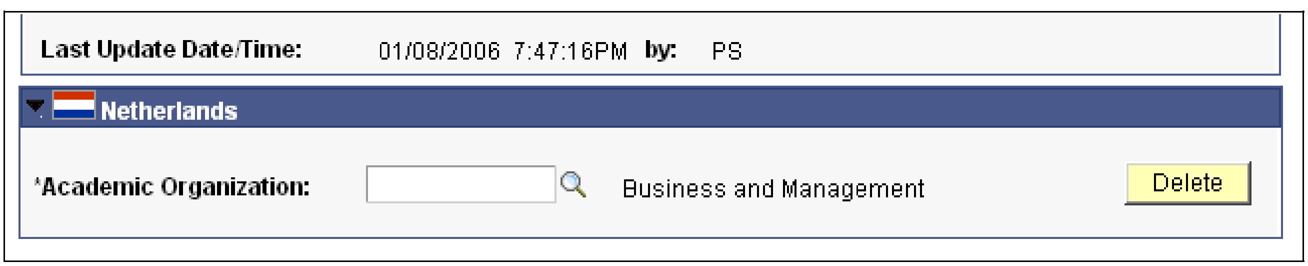
Page Name	***Definition Name***	***Navigation***	***Usage***
Regional	EXT_ORG_TBL_REG	• Campus Community, Organization, Create/Maintain Organizations, Organization Table • Contributor Relations, Constituent Information, Organizations, Organization Information, Organization Table	Enter the organization's regional data.

Entering Regional Data

Access the Regional page (Campus Community, Organization, Create/Maintain Organizations, Organization Table).



Regional page (1 of 2)



Regional page (2 of 2)

North American Industry Classification System

The NAICS code is a six-digit classification code that identifies the industrial classification of the organization's primary economic activity. This information appears on the VETS-100 report. The government no longer uses the VETS-100 Unit Number for VETS-100 reporting. Use this field to enter the company number provided by the Department of Labor. Enter the agricultural, land, or energy-related classification that indicates the industry with which the organization is associated.

(CAN) OUAC Organization Data

Universities in Ontario, Canada use the Ontario Universities Application Center (OUAC) throughout their undergraduate admissions process. The OUAC collects much of the undergraduate admissions data from various sources and electronically transmits the data to institutions in Ontario. You can enter OUAC organization data here.

(NLD) Netherlands

Academic Organization Enter the academic organization that is available for Netherlands Internship Contracts.

Entering School-Related Data

This section discusses how to:

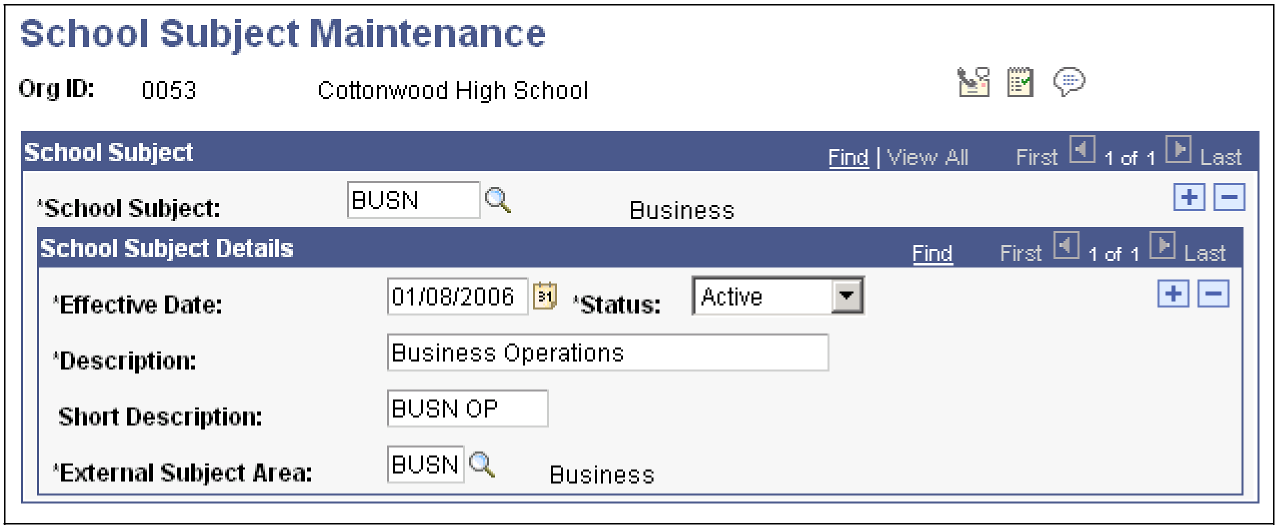
- Enter subjects offered by the organization.
- Enter the courses offered within a subject area.
- Set defaults for TS130 electronic transcripts.

Pages Used to Enter School-Related Data

Page Name	*Definition Name*	*Navigation*	*Usage*
School Subject Maintenance	SCHOOL_SUBJECTS	Campus Community, Organization, Create/Maintain Organizations, School Subject Maintenance	Enter subject areas offered by the school and relate them to subject areas that your institution offers.
School Course Classification	SCHOOL_COURSES	Campus Community, Organization, Create/Maintain Organizations, School Course Classification	Enter the courses offered for each of the organization's subject areas.
Organization TS130 Setup	ORG_E_ADDR_TS	Campus Community, Organization, Create/Maintain Organizations, Organization TS130 Setup	Enter defaults for sending TS130 electronic transcripts to a school.

Entering Subjects Offered by the Organization

Access the School Subject Maintenance page (Campus Community, Organization, Create/Maintain Organizations, School Subject Maintenance).



School Subject Maintenance page

School Subject

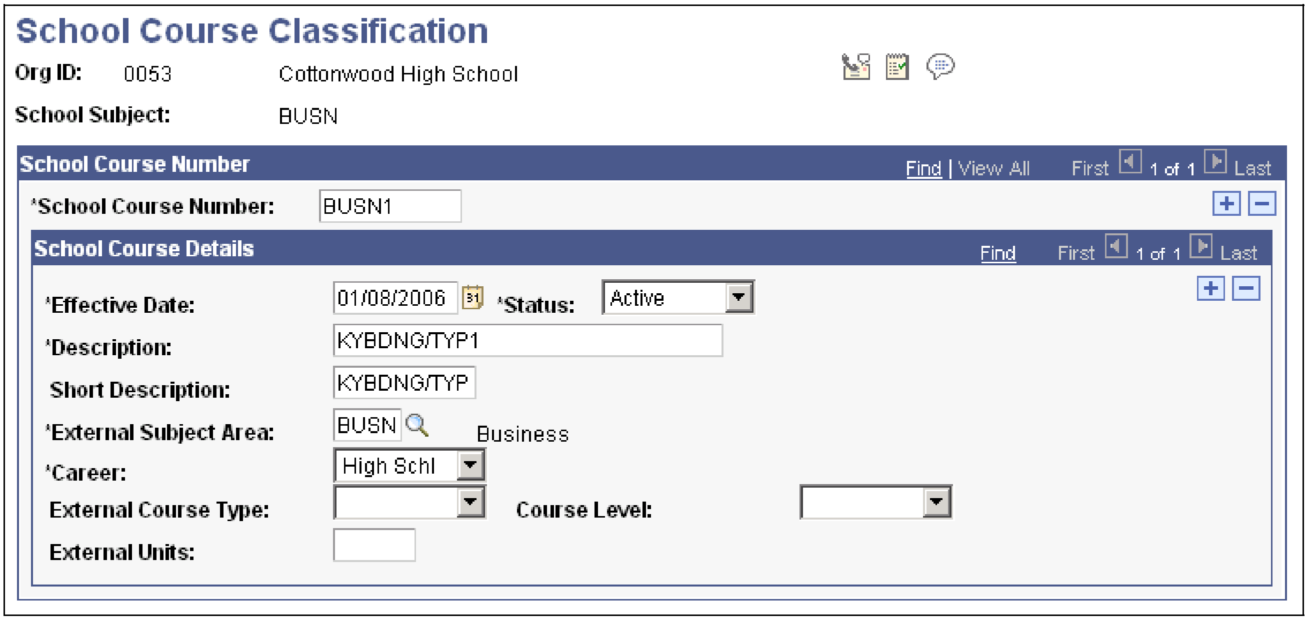
School Subject Enter the subject offered by your institution for which you want to track the equivalent subject at an external school.

School Subject Details

External Subject Area Enter the broad external subject area, from the External Subject Table page, that encompasses this subject at your institution.

Entering the Courses Offered within a Subject Area

Access the School Course Classification page (Campus Community, Organization, Create/Maintain Organizations, School Course Classification).



School Course Classification page

School Course Number

School Course Number Enter the number of the external course, usually the catalog number.

School Course Details

External Subject Area Enter the code, from the External Subjects Table page, that describes the subject area of this external course. When courses have different names but are similar in subject—for example, Chemistry and Biology—you can represent both by the single subject that you select here, such as LABS (for Laboratory Science).

Career Enter the career level (for example, *Undergraduate*, *Graduate*, or *PostDoc*) of this external course.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Course Level Enter the level (for example, *Freshman*, *Graduate*, or *Honors*) at which this course is offered.

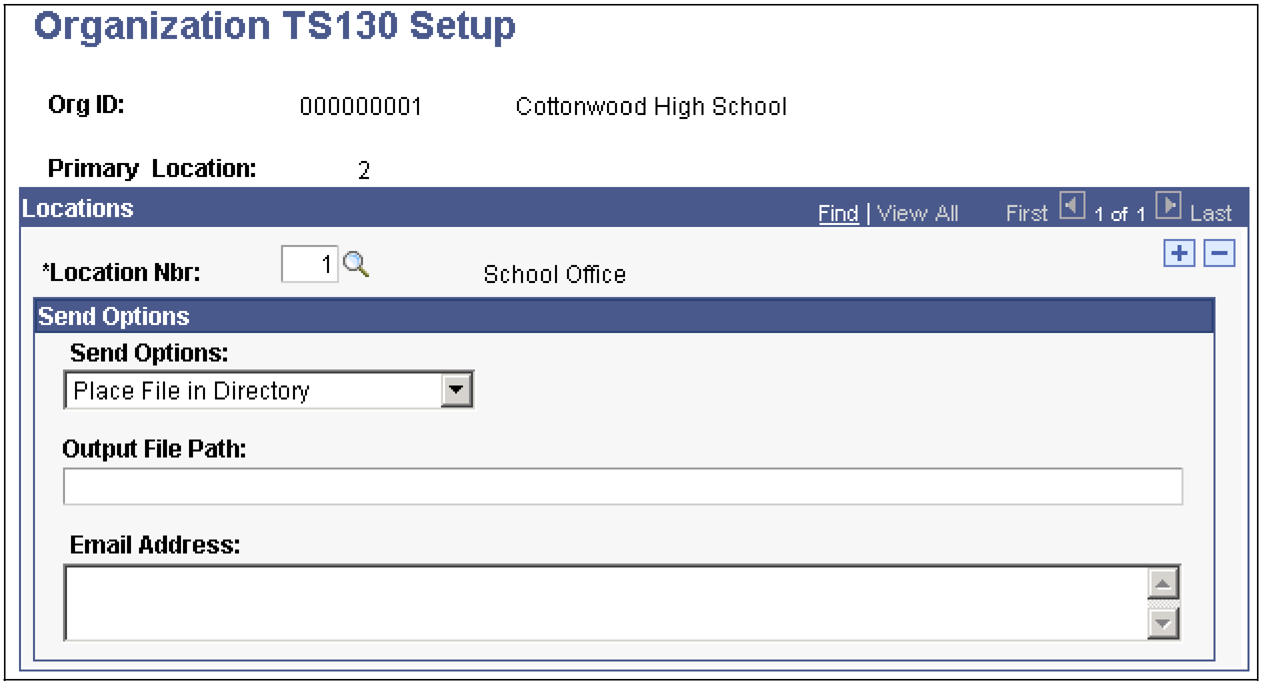
Values for this field are delivered with the system as translate values. You can modify these translate values.

External Course Type Enter the external course type.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Setting Defaults for TS130 Electronic Transcripts

Access the Organization TS130 Setup page (Campus Community, Organization, Create/Maintain Organizations, Organization TS130 Setup).



Organization TS130 Setup page

Enter defaults for sending electronic transcripts to the school. You can specify a directory in which to save the files and send them regularly in a group as FTP or any way that you choose. Or, you can send the transcripts by email, in which case you must enter the destination email address.

When creating a TS130 request, you can override the default values.

Entering Affiliations with Organizations

This section lists prerequisites and discusses how to enter organization affiliation details.

Prerequisites

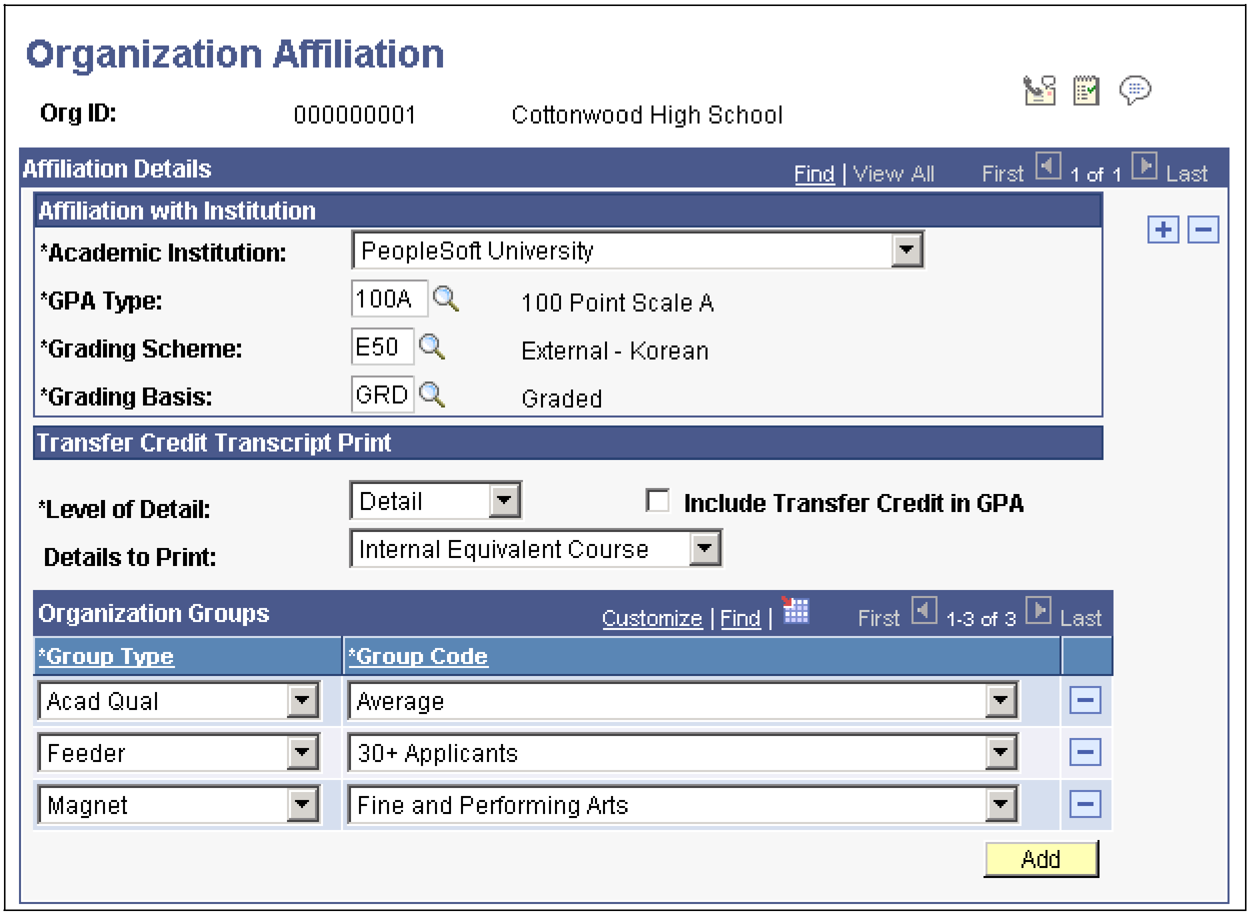
Before entering affiliation information, set up GPA types, grading schemes, grading bases, and transcript details.

Page Used to Enter Affiliations with Organizations

Page Name	*Definition Name*	*Navigation*	*Usage*
Organization Affiliation	EXT_ORG_AFFLTN	Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation	Enter organization affiliations details.

Entering Organization Affiliation Details

Access the Organization Affiliation page (Campus Community, Organization, Create/Maintain Organizations, Organization Affiliation).



Organization Affiliation page

Affiliation with Institution

Academic Institution Enter the institution with which this organization is affiliated.

GPA Type Enter the type of grade point average used by this organization.

Grading Scheme Enter the type of grading scheme used by this organization.

Grading Basis Enter the grading basis used by this organization.

Transfer Credit Transcript Print

Level of Detail Enter the level of detail of the transfer credit to print on the transcript.

Summary: Indicates that the system prints the total transferred units and GPA on the student's transcript.

Detail: Indicates that the system prints the information that you specify in the Details to Print field.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Include Transfer Credit in GPA Select to include the transfer credit from this organization in the student's GPA.

Details to Print This is available only when you select *Detail* in the Level of Detail field. Select the details that you want the system to print on the transcript: *None, External Courses, External and Internal,* or *Internal Equivalent Course.*

You should not modify these values.

Organization Groups

Group Type Enter the type of group, from the Organization Group Table page, to which this organization belongs.

Group Code Enter the code associated with the specified group type, which describes the group to which this organization belongs.

Chapter 53

Managing Organization Data

This chapter provides an overview of organization data, lists a common element, and discusses how to:

- Enter organization location data.
- Enter organization department data.
- Enter organization contact data.
- Review organization data.
- Manage organization IDs.
- Enter codes for external organizations.

Understanding Organization Data

After adding an organization to your database, you can enter information about an organization's various locations, including its addresses and phone numbers. You can enter as many locations for an organization as you need. You can enter locations from the menu item Organization Locations or through the Organization Table page. After you enter this information, you can specify the primary location for the organization on the Organization Table page.

You can enter information about an organization's various department names, locations, and email addresses. You can enter as many departments for an organization as you need. You can enter information about the department directly from the menu item Organization Departments or from the Organization Table page. After you enter this information, you can specify the primary department for this organization.

You can enter information about the people that your institution should contact at an organization, including the person's name, job title, and telephone numbers. You can enter as many contacts for an organization as you need. You can enter information about the contact directly from the menu item Organization Contacts or from the Organization Table page. After you enter this information, you can specify the primary contact for this organization.

You can review lists of all the locations, departments, and contacts for an organization.

You need to assign codes to the external organization and define priority control records to prevent the deletion of organization IDs.

Common Element Used in This Chapter

View Primary Location	Click to access the Organization Primary Location page where you can view the primary location for the organization.

Entering Organization Location Data

This section lists prerequisites and discusses how to:

- View the location summary data.
- Identify the organization location data.

Prerequisites

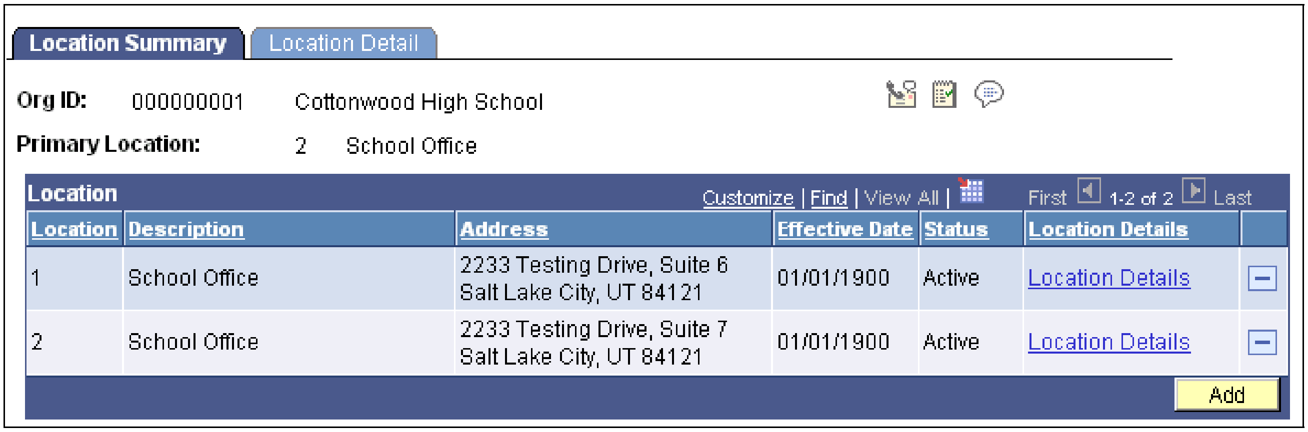
Before entering or updating organization location data, you must create an organization record.

Pages Used to Enter Organization Location Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Location Summary	ORG_LOC_EFFSUM	Campus Community, Organization, Create/Maintain Organization, Organization Locations. Click the Locations button on the Organization Table page.	View a summary of the location data.
Location Detail	ORG_LOCATIONS	Click the Location Details link on the Location Summary page.	Enter the physical or mailing address of the organization, the electronic addresses and the phone numbers for each location of an organization.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Location Detail page.	Enter address data for the organization's location.

Viewing the Location Summary Data

Access the Location Summary page (Campus Community, Organization, Create/Maintain Organization, Organization Locations).

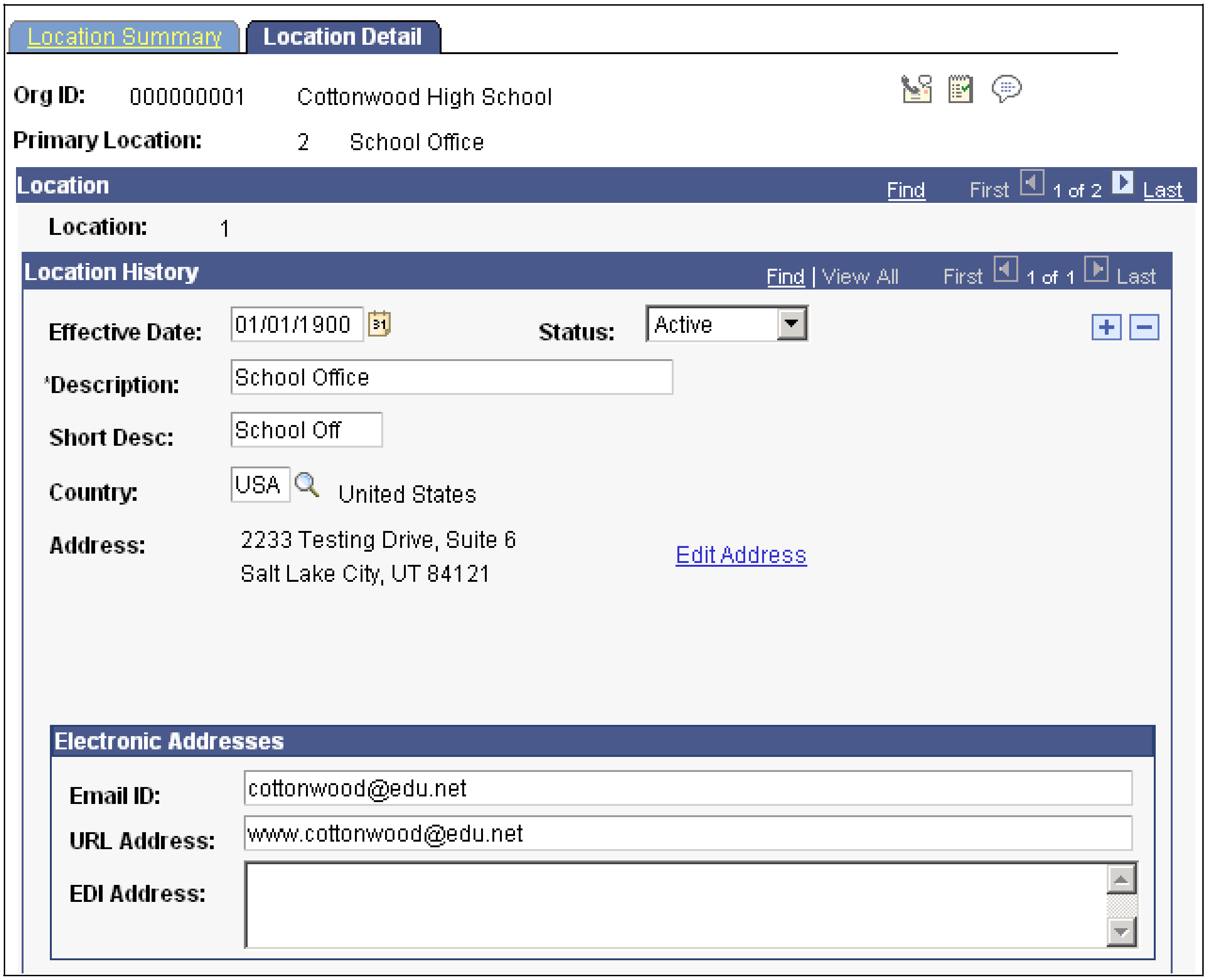


Location Summary page

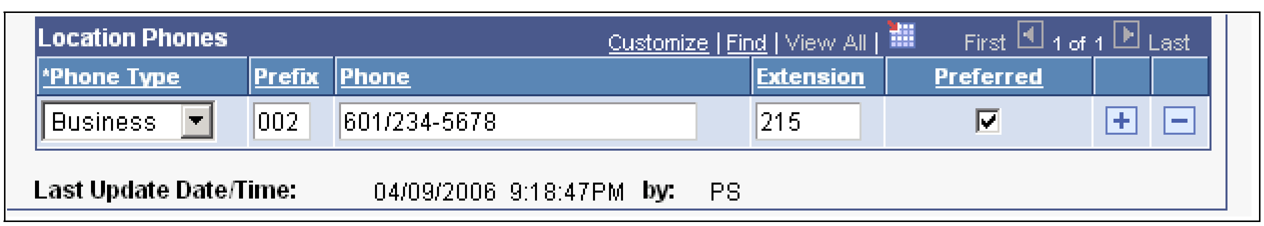
This page list the locations for the organization and is used to access the Location Detail page where you enter location data.

Identifying the Organization Location Data

Access the Location Detail page (click the Location Details link on the Location Summary page).



Location Detail page (1 of 2)



Location Detail page (2 of 2)

Location

Location

Displays the number of this location in the list of locations for this organization.

The system automatically assigns the next sequential number to each location that you add. You can manually override these numbers on the Organization Table page to rearrange the order of the locations.

Location History

Country
Enter the country of the location. Labels in the address format for the specified country display so you can add or review the address of this location.

Note. You must enter a country in this field to enable access to the Edit Address page.

Edit Address
Click to access the Edit Address page to add or modify the location address for the organization.

Enter the address. Click the OK button to return to the Location Detail page where the address is displayed. Additional addresses for this organization are added from the Location Summary page.

Electronic Address

Email ID
Enter the email address for this location of the organization.

URL Address
Enter the URL address of the World Wide Web page for this location of the organization.

EDI Address
Enter the Electronic Data Interchange (EDI) address for this location of the organization.

Location Phones

Phone Type
Enter the type of phone number for this location (for example *Main, Campus,* or *Business.*

Values for this field are delivered with the system as translate values. You can modify these translate values.

Preferred
Select to indicate that this is the preferred phone number for the location.

Entering Organization Department Data

This section lists prerequisites and discusses how to:

- View the organization's department summary data.
- Identify the organization departments.

Prerequisites

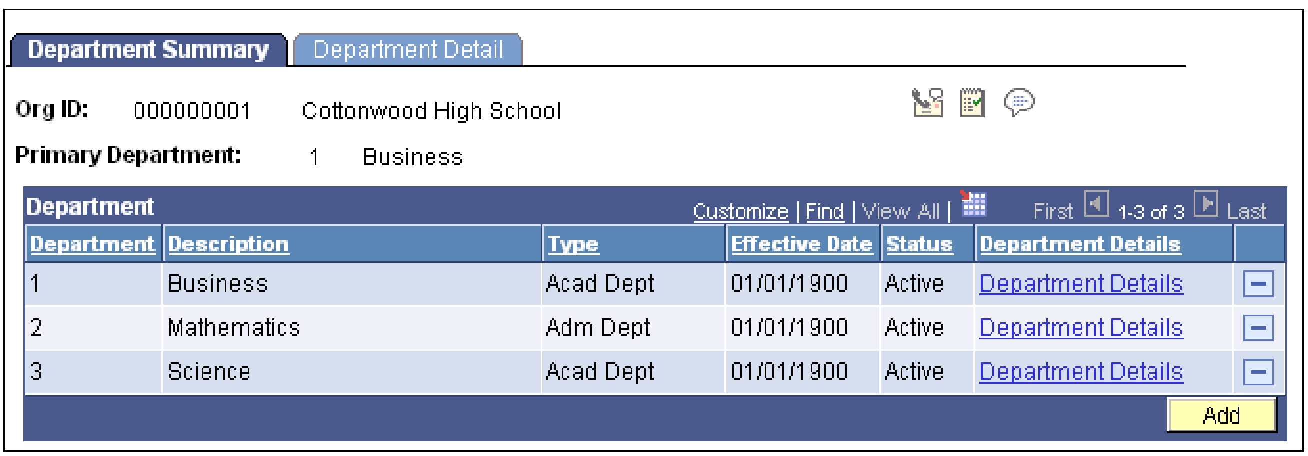
Before entering or updating organization department data, you must enter the organization location data on the Organization Table page.

Pages Used to Enter Organization Department Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Department Summary	ORG_DEPT_EFFSUM	Campus Community, Organization, Create/Maintain Organization, Organization Departments Click the Departments button on the Organization Table page.	View a summary of the department data.
Department Detail	ORG_DEPARTMENTS	Click the Department Details link on the Department Summary page.	Enter the department of the organization.

Viewing the Organization's Departments Summary Data

Access the Department Summary page (click the Departments button on the Organization Table page).

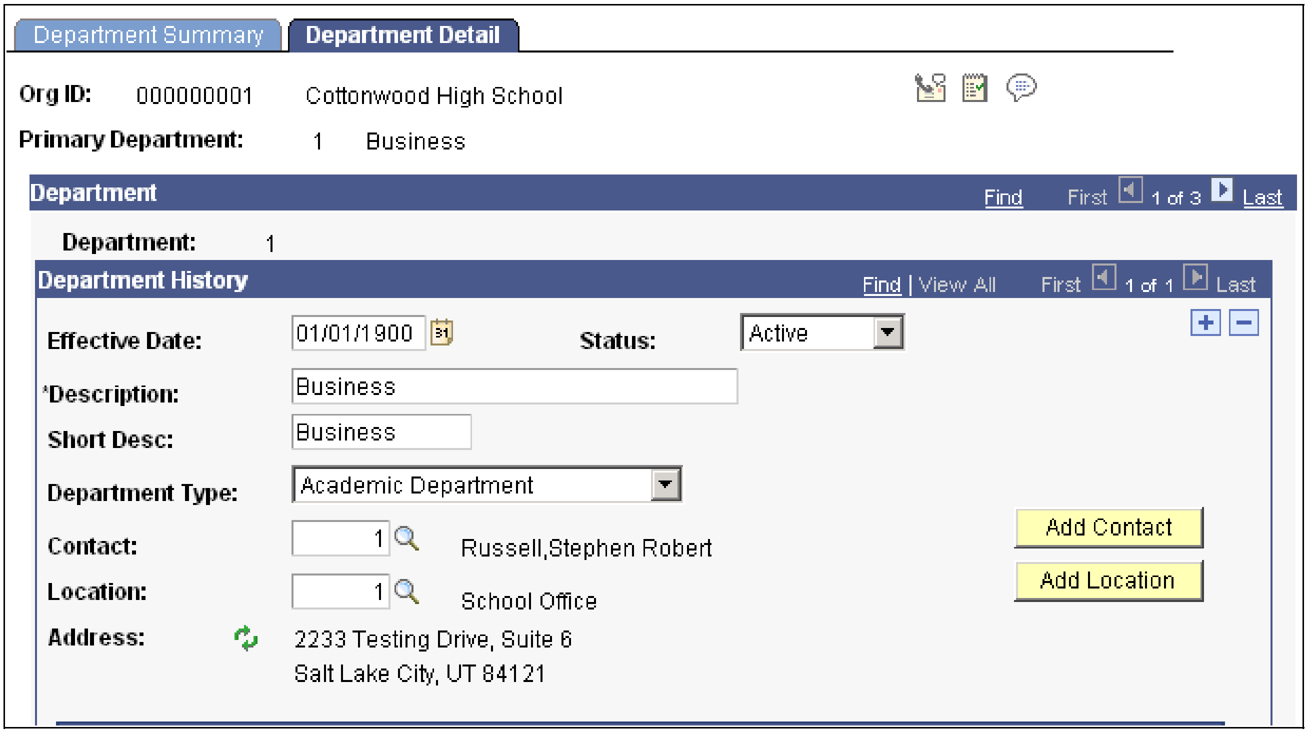


Department Summary page

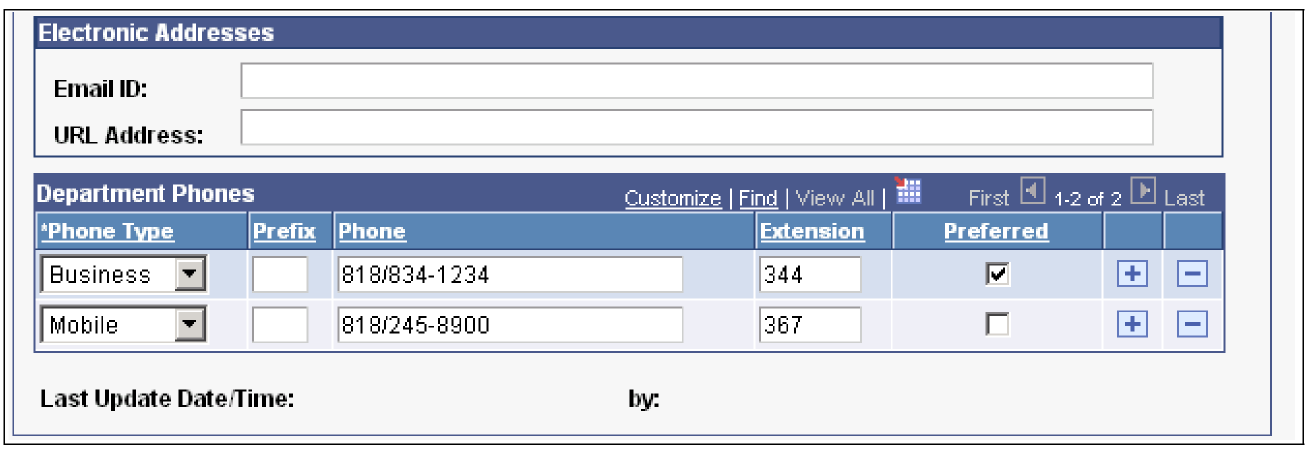
This page lists the department for the organization and is used to access the Department Detail page where you enter department data.

Identifying the Organization Departments

Access the Department Detail page (click the Department Details link on the Department Summary page).



Department Detail page (1 of 2)



Department Detail page (2 of 2)

Department

Department

Displays the number of this department in the list of departments for this organization.

The system automatically assigns the next sequential number to each department that you add. You can manually override these numbers on the Organization Table page to rearrange the order of the departments.

Department History

Department Type

Enter the type, either *Academic* or *Administrative,* that describes this department.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Contact

Enter the main contact, from the Contact Details page, for this department.

Note. You cannot enter a contact for this department unless the contact is entered on the Contact Detail page.

Location

Enter the location of the main contact, from the Location Detail page, for this department.

Add Contact

Click to access the Contact Detail page to add a new contact for this department.

When you have entered and saved the contact information, the contact appears on the Department Detail page.

Warning! You must enter the department data before entering a contact.

Add Location

Click to access the Location Detail page to add a new location for this department.

When you have entered the location, the contact appears on the Location Detail page.

Electronic Addresses

Email ID

Enter the email address for this department of the organization.

URL Address

Enter the URL address for the World Wide Web page for this department of the organization.

Department Phones

Phone Type

Enter the type of phone for this department.

Values for this field are delivered with the system as translate values. You can modify these translate values

Preferred

Select to indicate that this phone number is the preferred phone number to contact this department.

Entering Organization Contact Data

This section lists prerequisites and discusses how to:

- View the organization's contact summary data.
- Identify the organization's contacts data.
- Identify the preferred contact.

Prerequisites

Before entering or updating organization contact data, you must enter the organization department data.

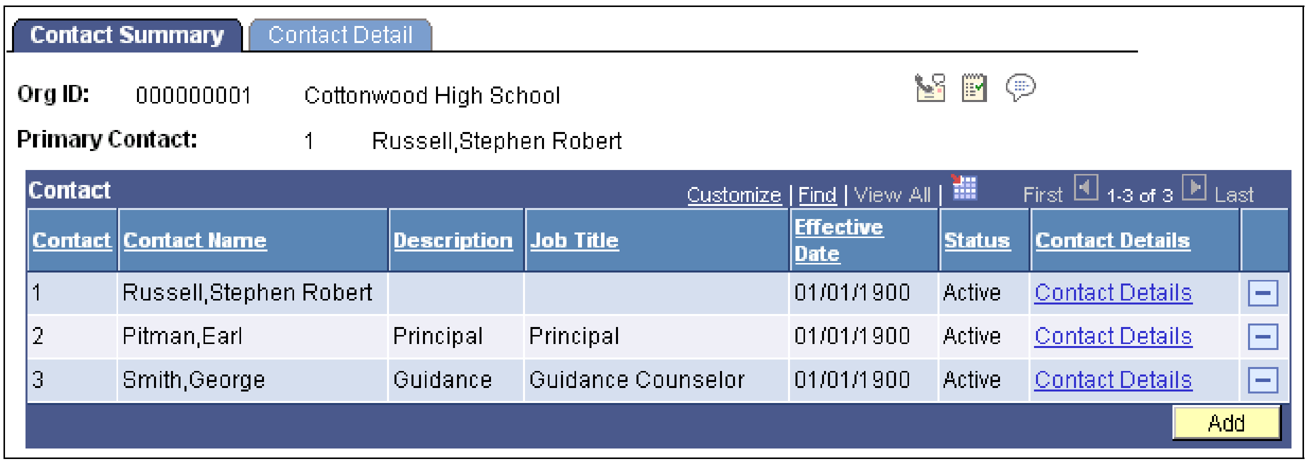
Pages Used to Enter Organization Contact Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Contact Summary	ORG_CNTC_EFFSUM	Campus Community, Organization, Create/Maintain Organizations, Organization Contacts Click the Contacts button on the Organization Table page.	View a summary of the contact data.
Contact Detail	ORG_CONTACTS	Click the Contact Details link on the Contact Summary page.	Specify the contact for the organization.
Addresses	ADDRESSES_89	Click the Addresses link on the Contact Detail page.	View or modify the list of addresses for the contact.

Page Name	*Definition Name*	*Navigation*	*Usage*
Contact Type Preferred	SCC_ORGCNTC_PRI	Click the Contact Type Preferred button on the Organization Table page. Campus Community, Organization, Create/Maintain Organizations, Contact Type Preferred	Enter the organization's preferred contact.

Viewing the Organization's Contact Summary Data

Access the Contact Summary page (click the Contacts button on the Organization Table page).

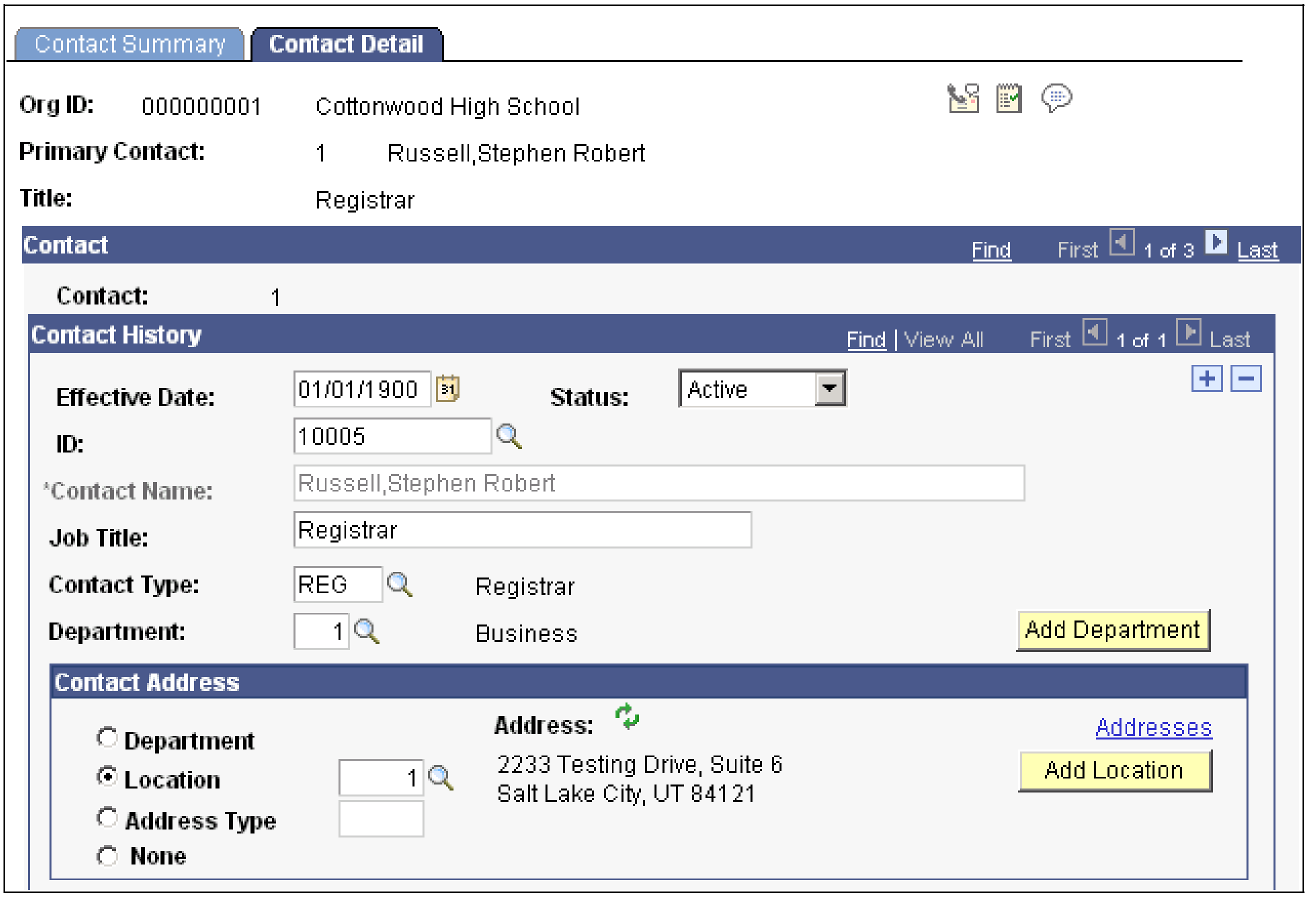


Contact Summary page

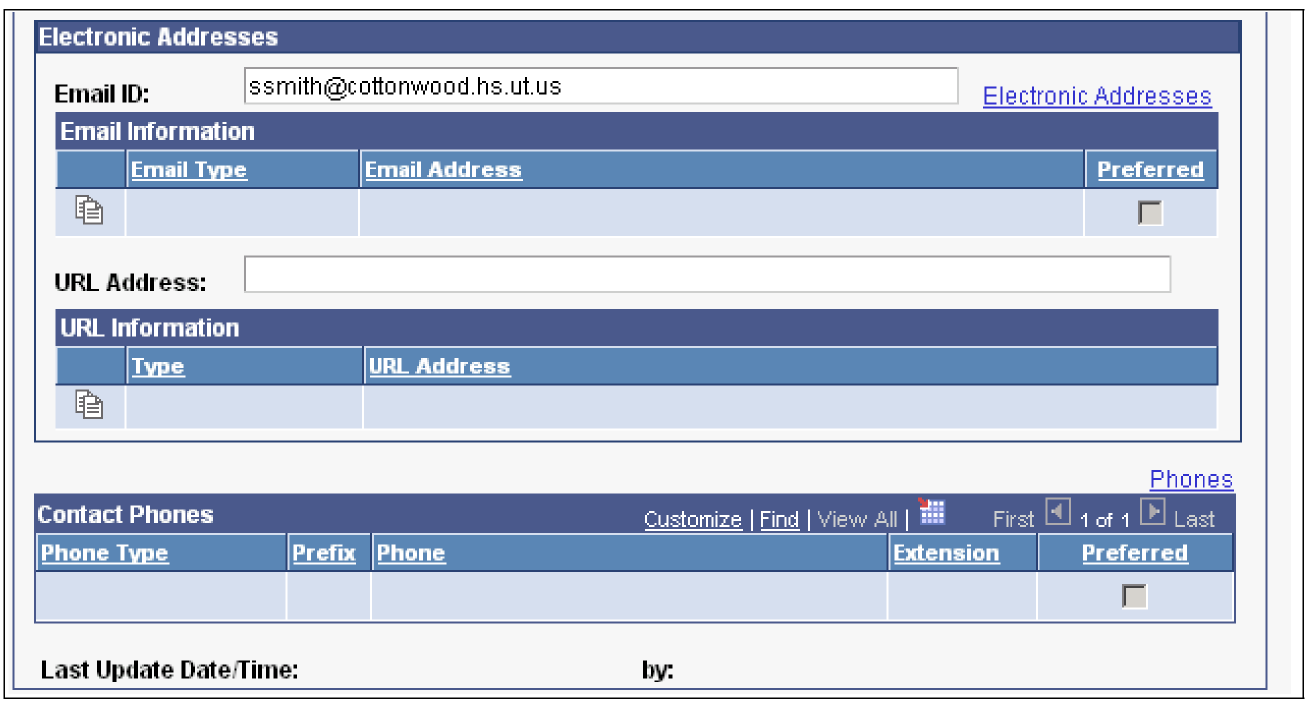
This page lists the contacts for the organization and is used to access the Contacts Detail page where you enter contact data.

Identifying the Organization's Contacts Data

Access the Contact Detail page (click the Contact Details link on the Contact Summary page).



Contact Detail page (1 of 2)



Contact Detail page (2 of 2)

Contact

Contact

Displays the number of this contact in the list of contacts for this organization.

The system automatically assigns the next sequential number to each contact that you add.

Contact History

ID

Enter the ID of this contact person, if the person exists in your database.

Contact Name

Enter the name of this contact person.

If the person is in your database, the system automatically displays the person's name when you select the ID. If the person is not in your database, you must enter the name manually.

Contact Type

Enter the type of contact (for example, *Teacher, Principal, Guidance Counselor,* or *Primary Contact*) from the Contact Type Table page.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Add Department

Click to access the Department Detail page to add the department for this contact.

Contact Address

Department

Select to indicate that a department address should be used as the address for the contact.

Location

Select to indicate that a location should be used as the address for this contact and enter the location.

Address Type

If the contact is one that has an ID in the system and this ID has one or many addresses, the user can then select an available address type (Business, Home, and so on) for this ID and it should be used as the address for this contact.

None

Select to indicate that no address is specified for this contact.

Add Location

Click to access the Location Detail page to add a location for this contact.

If you select the Location or Address Type option you must also specify which location or address type to use.

Click the Refresh icon to display the address data associated with the option that you select.

If the contact has an ID in the system, the Addresses link displays. Click to access the Addresses page where you can add a new address for this ID which is used as the contact address.

Electronic Addresses

Email ID Enter the email address for this contact in the organization.

Contact Phones

Phone Type Enter the type of phone for this contact.

Values for this field are delivered with the system as translate values. You can modify these translate values.

Prefix Enter the country code that precedes the phone number.

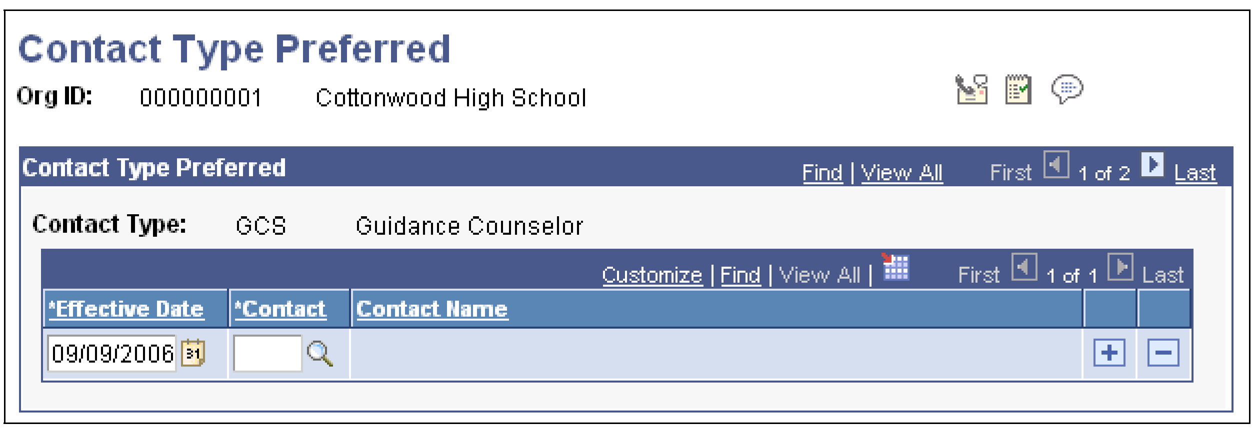
Phone Enter the phone number for this contact.

Extension Enter the phone extension at which the contact can be contacted.

Preferred Select to indicate that this phone number is the preferred phone number for this contact.

Identifying the Preferred Contact

Access the Contact Type Preferred page (click the Contact Type Preferred button on the Organization Table page).



Contact Type Preferred page

If the individual is the preferred contact for this contact type, enter the individual's specific contact number in the Contact field. Contact numbers are assigned by the system on the Contact Summary page. Active contacts must be available for the specified contact type to identify it as a preferred contact.

Reviewing Organization Data

This section discusses how to:

- View location data.
- View primary location data.
- View school data.
- View phone data.
- View department data.
- View organization department details.
- View contact data.
- View organization contact details.
- View organizations by group types.

Pages Used to Review Organization Data

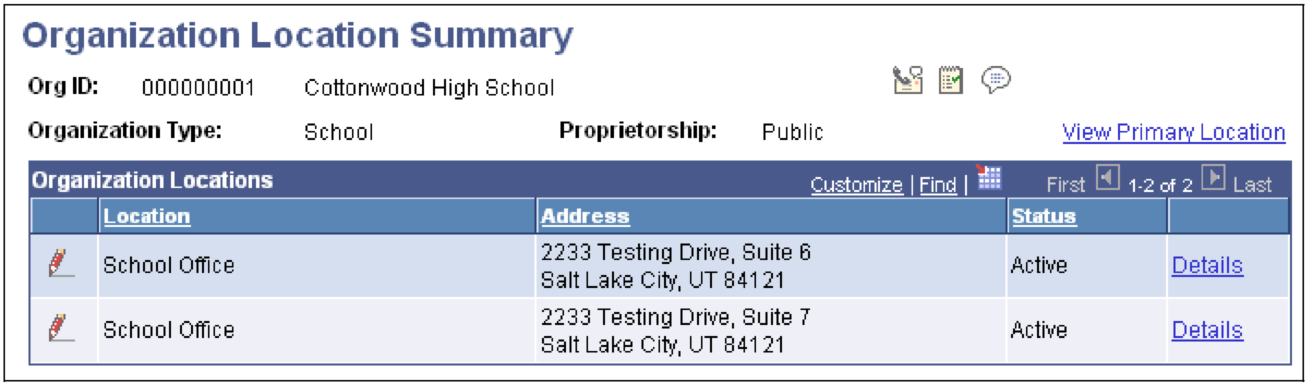
Page Name	***Definition Name***	***Navigation***	***Usage***
Organization Location Summary	EXT_ORG_LOC_SUM	• Campus Community, Organization, Review Organizations, Organization Location Summary • Contributor Relations, Constituent Information, Organizations, Organization Information, Location Summary	Review all the locations for an organization.
Organization Primary Location	EXT_ORG_PRIM_LOC	Click the View Primary Location link on the Organization Location Summary page.	View data for the primary location for an organization.
Organization School Information	SCHOOL_INFO	Click the School Information link on the Organization Primary Location page.	View the school characteristics of an organization location.

Page Name	***Definition Name***	***Navigation***	***Usage***
Location Summary	ORG_DEPT_EFFSUM	Click the Pencil icon to display the Location Summary page.	View a summary of the location data.
Organization Phone Information	EXT_ORG_LOC_PHN	Click the Details link on the Organization Location Summary page.	View the phone and electronic address information for an organization location.
Organization Department Summary	EXT_ORG_DEPT_SUM	• Campus Community, Organization, Review Organizations, Organization Dept. Summary • Contributor Relations, Constituent Information, Organizations, Organization Information, Department Summary	Review the departments for a specific organization.
Department Summary	ORG_DEPT_EFFSUM	Click the Pencil icon on the Organization Department Summary page.	View a summary of the department data.
Org Department Detail (organization department detail)	EXT_ORG_DEPT_DTL	Click the Details link on the Organization Department Summary page.	View the mailing and electronic addresses and phone information for this department.
Organization Contacts Summary	EXT_ORG_CNTCT_SUMM	• Campus Community, Organization, Review Organizations, Organization Contacts Summary • Contributor Relations, Constituent Information, Organizations, Organization Information, Contact Summary	Review the contacts for a specific organization.
Contact Summary	ORG_CNTC_EFFSUM	Click the Pencil icon to display the Contact Summary page.	View a summary of the contact data.
Organization Contact Detail	EXT_ORG_CNTCT_DTL	Click the Details button on the Organization Contact Summary page.	View the mailing and electronic addresses and phone information for this contact.

Page Name	Definition Name	Navigation	Usage
Organization Groups Summary	ORG_GROUP_SUMM	Campus Community, Organization, Review Organizations, Organization Groups Summary	Review all organizations by group.

Viewing Location Data

Access the Organization Location Summary page (Campus Community, Organization, Review Organizations, Organization Location Summary).



Organization Location Summary page

The Organization Location Summary page is for viewing only. You cannot enter or modify data on this page. Information displayed here is from the Location Summary and Location Detail pages.

Organization Locations

	Click to access the Location Summary or Detail page where you can view or modify the contacts data.
Details	Click to access the Organization Phone Information page where you can view the electronic address and phone numbers for this location of the organization.

Viewing Primary Location Data

Access the Organization Primary Location page (click the View Primary Location link on the Organization Location Summary page).

Organization Primary Location page

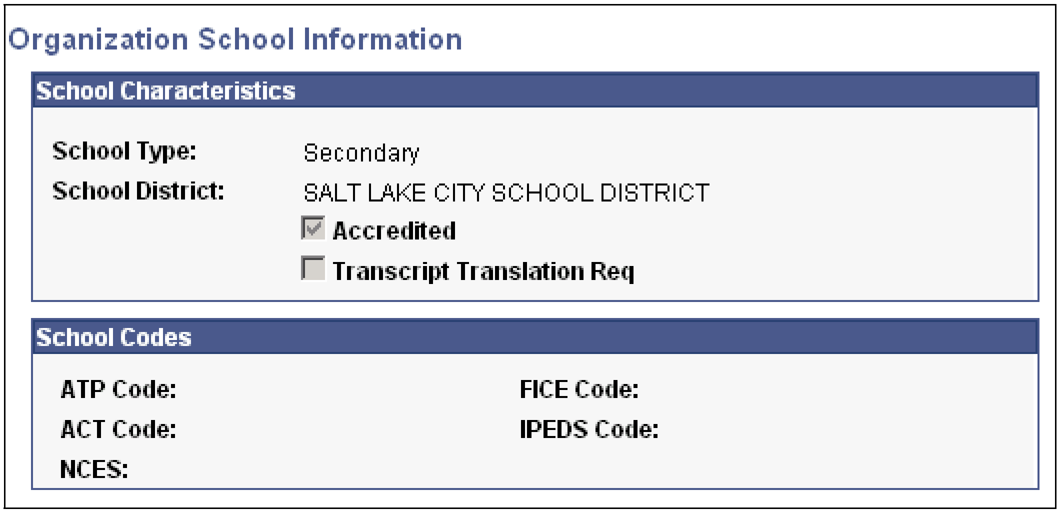
The Organization Primary Location page is for viewing purposes only. You cannot enter or modify data on this page. Information here is from the Organization Locations page.

Primary Location

School Information	Click to access the Organization School Information page, where you can view the school characteristics for this organization location.

Viewing School Data

Access the Organization School Information page (click the School Information link on the Organization Primary Location page).

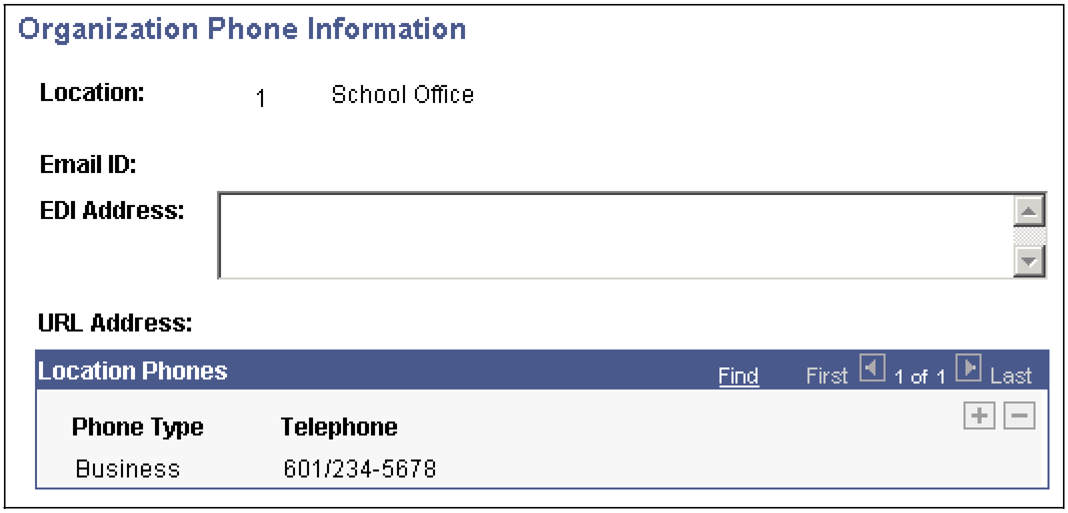


Organization School Information page

The Organization School Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the School Data page.

Viewing Phone Data

Access the Organization Phone Information page (click the Details link on the Organization Location Summary page).

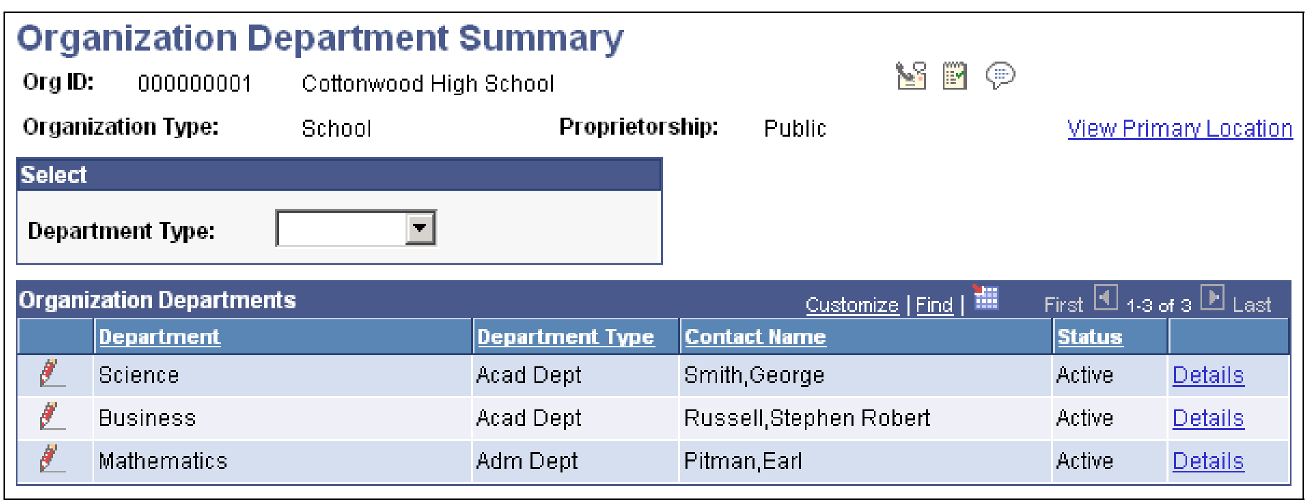


Organization Phone Information page

The Organization Phone Information page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Location Details page.

Viewing Department Data

Access the Organization Department Summary page (Campus Community, Organization, Review Organizations, Organization Dept. Summary).



Organization Department Summary page

Information displayed on this page is from the Department Summary page.

Select

Department Type Select *Acad Dept* or *Adm Dept* if you want to only display one department.

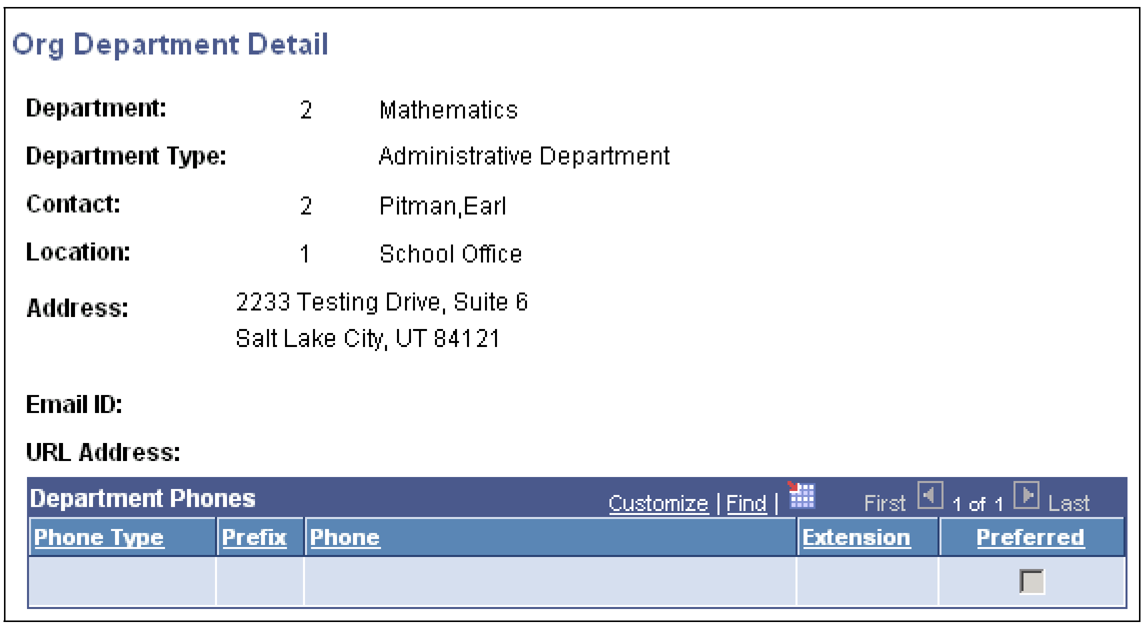
Organization Departments

Click to access the Department Summary and Detail pages where you can view the department data.

Details Click to access the Org Department Detail (organization department detail) page where you view the physical or mailing address, the electronic address and the phone numbers for this department.

Viewing Organization Department Details

Access the Org Department Detail (organization department detail) page (click the Details link on the Organization Department Summary page).

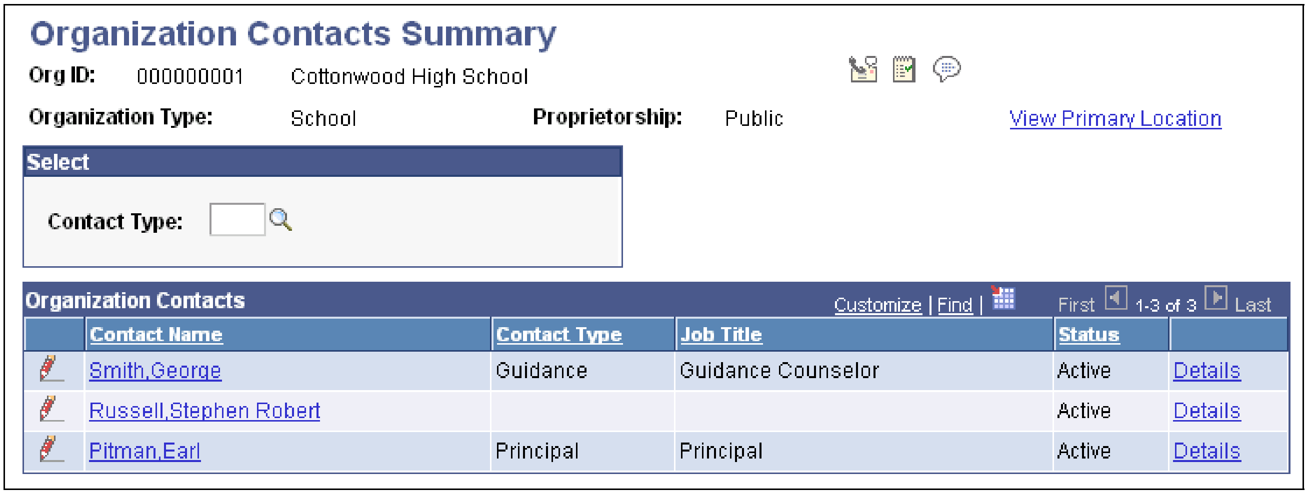


Org Department Detail page

The Org Department Detail (organization department detail) page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Department Detail page.

Viewing Contacts Data

Access the Organization Contacts Summary page (Campus Community, Organization, Review Organizations, Organization Contacts Summary).



Organization Contacts Summary page

Information displayed on this page is from the Contact Summary page.

Select

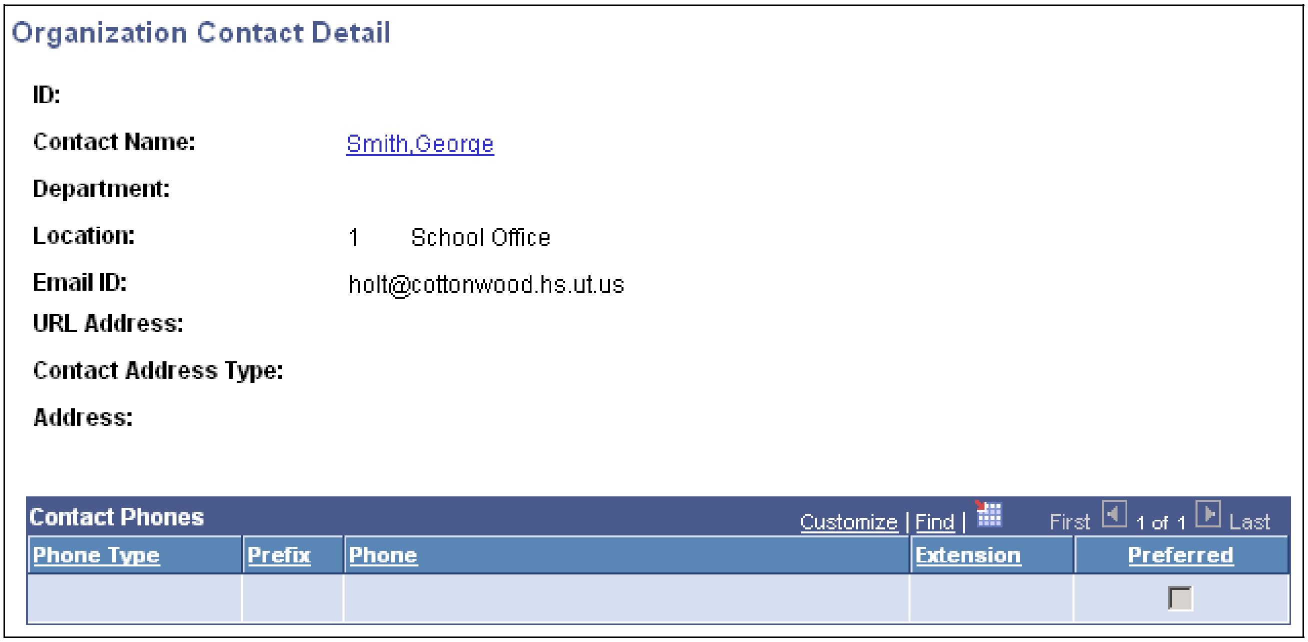
Contact Type	Enter the contact type if you want to indicate a primary contact.

Organization Contacts

	Click to access the Contact Summary page where you can view contact data.
Details	Click the to access the Organization Contact Details page to view the mailing and electronic addresses, and phone information for this contact.

View Organization Contact Details

Access the Organization Contact Detail page (click the Details button on the Organization Contact Summary page).

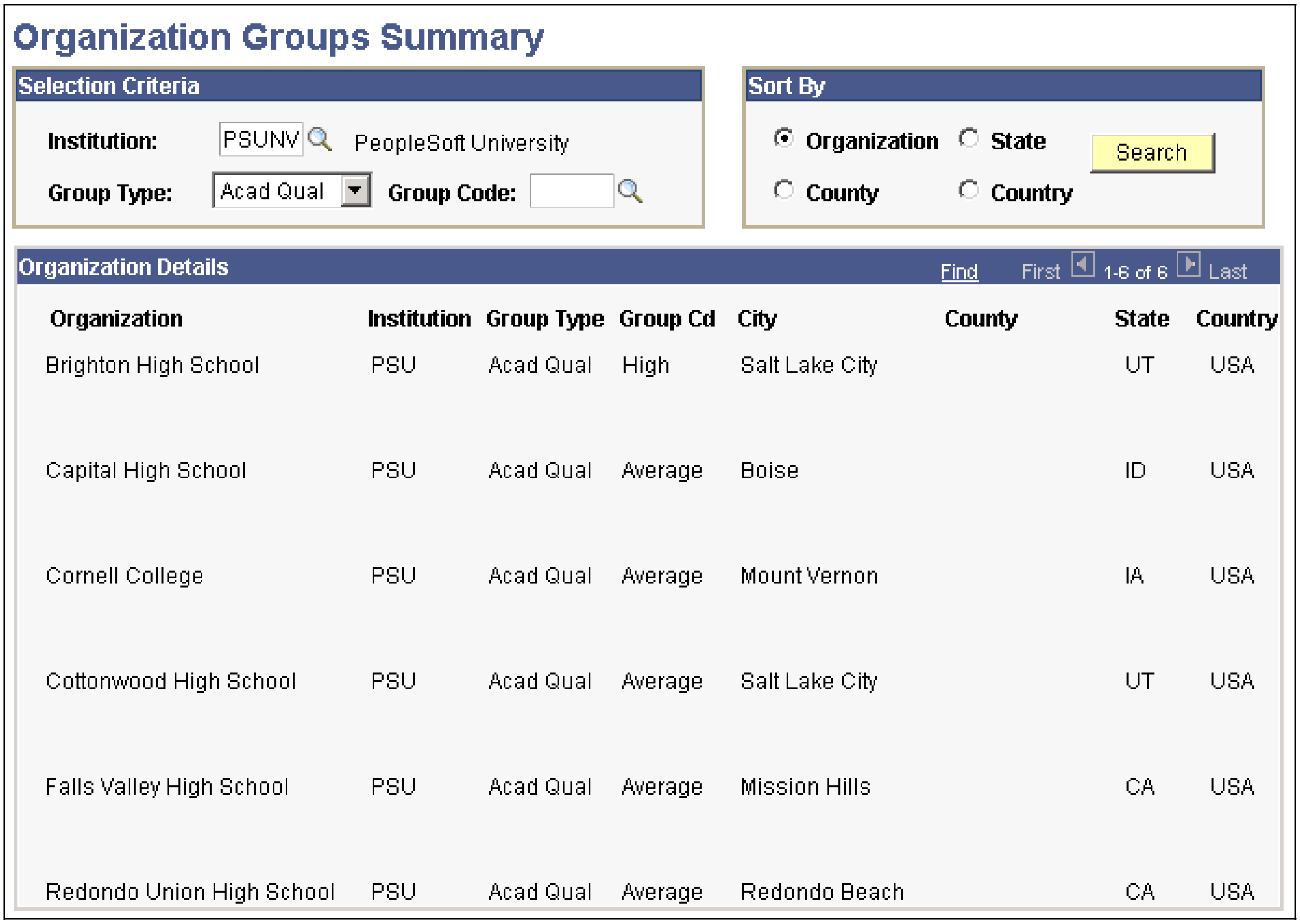


Organization Contact Detail page

The Organization Contact Detail page is for viewing purposes only. You cannot enter or modify data on this page. Information displayed here is from the Contact Detail page.

Viewing Organizations by Group Types

Access the Organization Groups Summary page (Campus Community, Organization, Review Organizations, Organization Groups Summary).



Organization Groups Summary page

Selection Criteria

Institution The institution associated with the organizations to review.

Group Type The type of group *(Academic Quality, Feeder,* or *Magnet),* from the Organization Affiliation page, to review.

Note. Because the purpose of this page is to enable you to review a summary of organizations by group, you *must* specify a group type value.

Group Code The group code, from within the group type, to review.

Sort By

Search Click to launch the search based on the selected criteria.

Managing Organization IDs

You can define priority control records to prevent the deletion of organization IDs. You can also change an organization's ID from the system-generated ID to another ID.

Entering Codes for External Organizations

This section provides an overview of external organization codes, lists prerequisites, and discusses how to assign codes to external organizations.

Understanding External Organization Codes

You can enter and track external codes for organizations. You can load third-party external codes into your system, for example EPS or ATP codes, and view the results of the automated assignment process on the Organization External Codes page.

Prerequisites

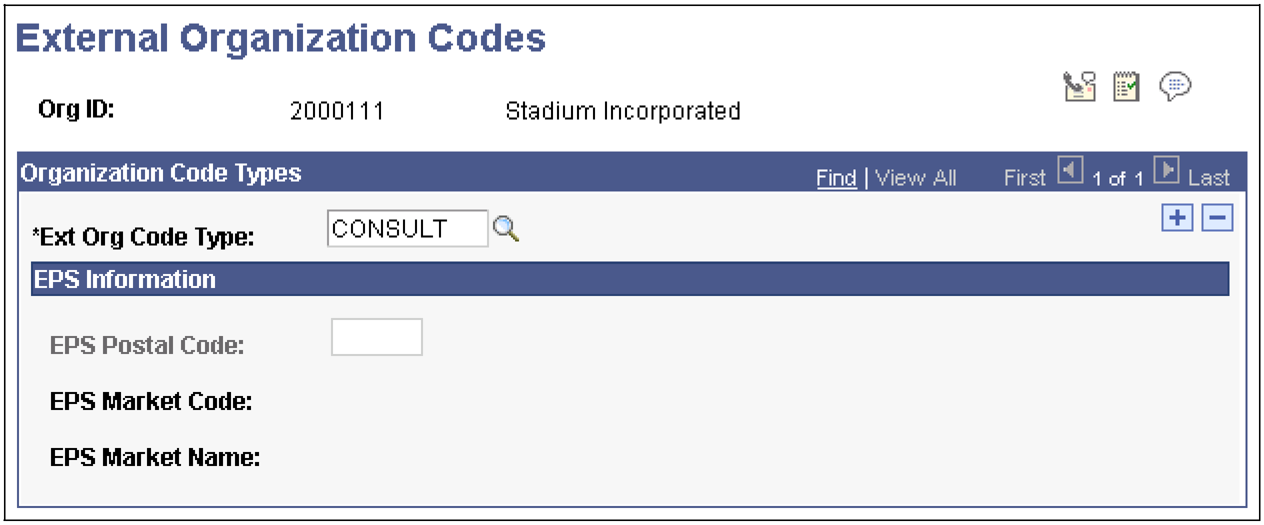
Before assigning codes to external organizations, set up the code types from which to select.

Page Used to Enter Codes for External Organizations

Page Name	***Definition Name***	***Navigation***	***Usage***
External Organization Codes	EXT_ORG_CODES	Campus Community, Organization, Create/Maintain Organizations, External Organization Codes	Assign or review codes for external organizations.

Assigning Codes to External Organizations

Access the External Organization Codes page (Campus Community, Organization, Create/Maintain Organizations, External Organization Codes).



External Organization Codes page

Organization Code Types

Ext Org Code Type (external organization code type) — The code, from the External Organization Code Table page, that applies to this organization.

EPS Information

EPS Postal Code — If the code type is set as an EPS code on the External Organization Code Table page, the EPS Postal Code field is available.

If EPS codes are loaded into your system, you can select from the EPS postal codes for this organization.

EPS Market Code — The system displays the EPS market code based on the EPS postal code.

EPS Market Name — The system displays the EPS market name based on the EPS postal code.

Chapter 54

Loading External Organization Data

This chapter provides an overview of loading external organization data and discusses how to:

- Load external ATP data.
- Load external EPS market code data.

Understanding External Data Load

When you load data from an external source, you load it into a suspense table. You can then review the data in the suspense table and modify it. To load data into the suspense table, position the source file or tape, specify the location of the source, and run the appropriate load external data process.

PeopleSoft Process Scheduler runs the process and stores the data in the suspense tables. When it is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. Use this number to review the data on the appropriate Suspense Process Options page.

Loading External ATP Data

This section provides an overview of loading ATP data and discusses how to:

- Specify the data source.
- Review suspense process options data.
- Review school address data.
- Review other school data.
- Review ATP data suspense messages.
- Review all ATP messages.
- Specify search parameters.
- Search for duplicate records and post the data.
- Purge ATP data from the suspense file.

Understanding ATP Data Load

When you schedule the process, PeopleSoft Process Scheduler runs the CCATPLOD.SQR process and stores the ATP data in the ATP suspense tables. When the process is finished, the PeopleSoft Process Scheduler displays a process instance number in the lower left corner of the screen. You can review the loaded data on the ATP Suspense Process Options page.

The ATP suspense tables hold records not yet posted to the organization tables. School data from these tables migrates to your database during the posting process based on the options that you select on the ATP Search Parameters and ATP Post Parameters pages.

You can review data in the ATP suspense table at any time during the ATP external data load process. You might want to look at the data immediately after loading it, after performing a search/match on it, or after posting it. You can determine if a record is yet to be processed, if a record was added to your database, and if any errors were encountered during the search/match or loading processes.

Note. If you have not yet posted the data, you can edit it on the ATP Suspense Table page. When editing data in the suspense tables, you must be careful not to create duplicate records that are added to the database during posting.

You may choose to correct errors on the appropriate pages before running the post process. When you make changes to fields in this component, click Save; the other fields are updated according to the revisions you made. For example, if the Edit field displayed *Error,* when you fix the errors in the file and save it, the program updates the Edit field to *Complete.*

You should always click Save before changing any of the processing options so that you can review the results of any data changes you made.

After loading the ATP data into a suspense table, run the ATP Search/Match process to check for duplicate matching records before posting the data. Each record in the ATP load contains a change code value **—** *Add, Change,* or *Delete* **—** that instructs the system to add the record as new or to change or delete the existing one. The Search/Match process investigates the database to identify conflicts between existing data and the data loaded for posting, and between existing data and the action required by the change code. You must decide what you want the system to do in the case of conflicts.

For example, if the change code is *Add,* and the system finds an existing record that matches the load data, the system does not update the existing data and add it for posting; you must decide whether the system should update the existing data, place that load data in suspense until you can investigate it further, or ignore and skip over it. You must also decide what the system should do if the change code is *Change* or *Delete* and it finds no matching record to change or delete.

After loading the ATP external data into the suspense table and selecting the parameters for the Search/Match process, run the CCATPPST.SQR process to post the data. You can process and post a single record or all records in the suspense table.

You can remove records from a ATP suspense table by running the ATP Purge Suspense File process.

The PeopleSoft Process Scheduler runs the CCATPPRG.SQR process and purges the designated records from the ATP suspense file. When it is finished, the organizations whose data was loaded are added to the database and organization IDs are assigned to them.

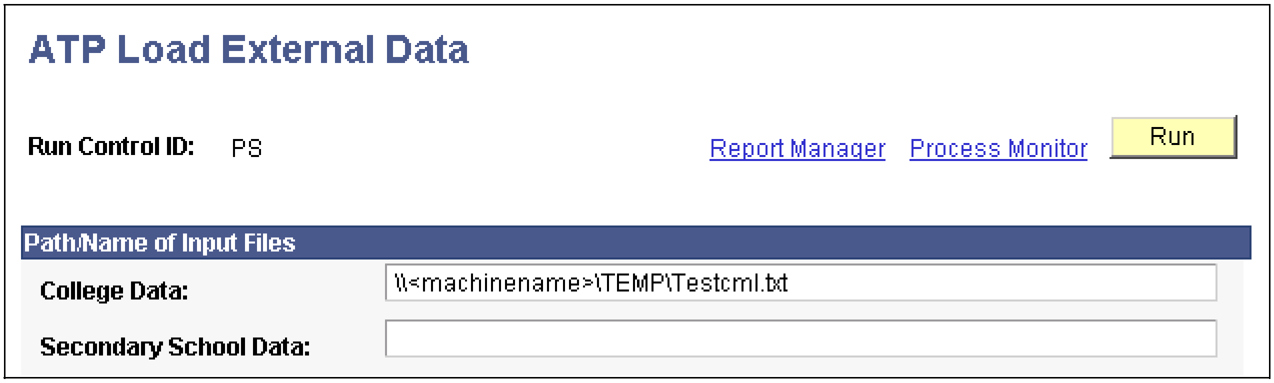
Before you load the external ATP data, you must set up ATP country names and school types. Refer to the PeopleSoft Campus Community Fundamentals 9.0 PeopleBook, "Setting Up Organization Data", Setting Up ATP Country Names and School Types.

Pages Used to Load External ATP Data

Page Name	***Definition Name***	***Navigation***	***Usage***
ATP Load External Data	ATP_LOAD_PARMS	Campus Community, Organization, Organizations Data Load, ATP Load External Data	Specify the source from which the load process should get the ATP data.
ATP Suspense Process Options	ATP_SUSP_PROC_OPTN	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Process Options	Review and edit the status of data in the ATP Suspense Table.
ATP Suspense Address Data	ATP_SUSP_ADDRESS	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Address Data	Review address information loaded for a specific school.
ATP Suspense Data	ATP_SUSP_DATA	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Data	Review data other than address data for the school record loaded.
ATP Messages	ATP_SUSP_MESSAGE	Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Messages	Review and resolve ATP suspense messages.
ATP Messages	ATP_MESSAG_TABLE	Campus Community, Organization, Organizations Data Load, ATP Messages	Review any of the ATP data messages in your system.
ATP Search Parameters	ATP_SEARCH_PARMS	Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Search Parameters	Select search parameters to identify duplicate matching records before posting the data.
ATP Post Parameters	ATP_POST_PARMS	Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Post Parameters	Select parameters for posting the data.
ATP Purge Suspense File	ATP_PURGE_PARMS	Campus Community, Organization, Organizations Data Load, ATP Purge Suspense File	Purge data from the ATP Suspense Table.

Specifying the Data Source

Access the ATP Load External Data (Campus Community, Organization, Organizations Data Load, ATP Load External Data).



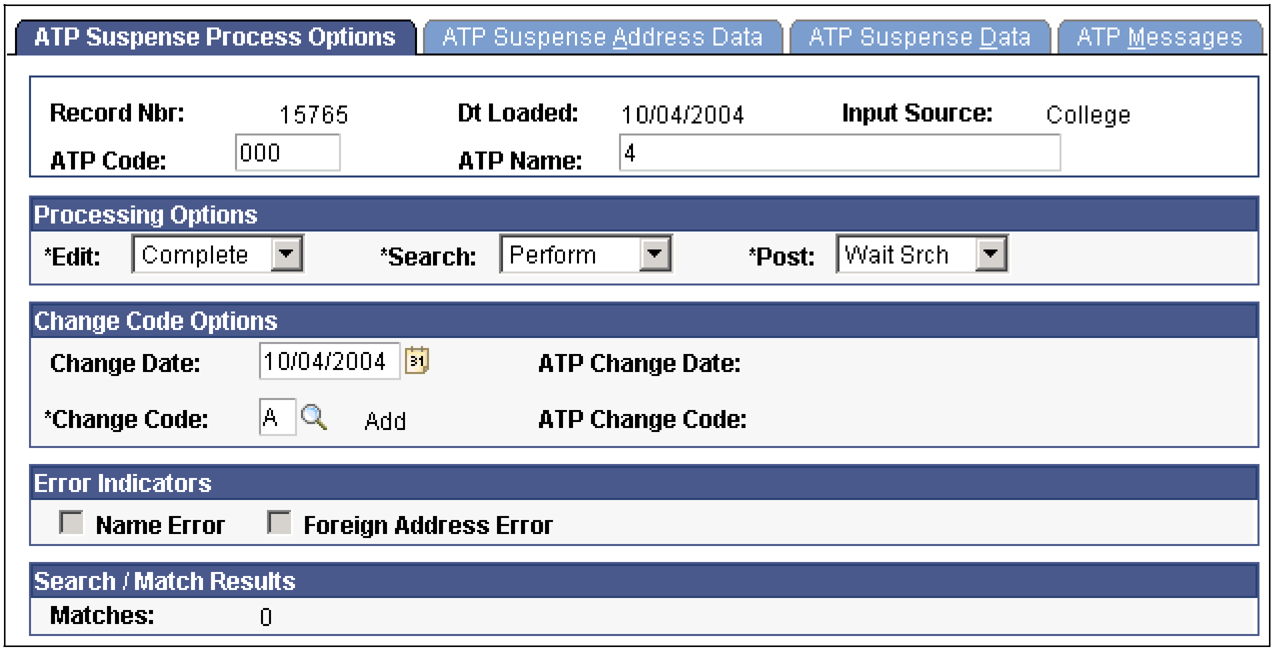
ATP Load External Data page

College Data If the ATP data is college data, specify the correct path to the input file here.

Secondary School Data If the ATP data is secondary school data, specify the correct path to the input file here.

Reviewing Suspense Process Options Data

Access the ATP Suspense Process Options page (Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Process Options).



ATP Suspense Process Options page

The top portion of this page displays information about the ATP record: the ATP record number, date loaded, input source, ATP code, and ATP name. You can override the ATP code and ATP name if necessary.

Processing Options

Values for the Edit, Search, and Post fields are delivered preset with the system.

Warning! You can manually edit the values in the Edit, Search, and Post fields; however, if any of these fields shows a status of *Error* and you manually change the status without correcting the error, you might have problems when posting the data.

Edit

The status of the record as the result of the load external data process.

Complete: The program was able to process this record without a problem.

Error: The program encountered problems when processing this record.

Perform: This value is only set manually and is for informational purposes.

Search

The status of the record as the result of the Search/Match process:

Complete: The Search/Match process ran without errors.

Error: The Search/Match process ran and errors were detected in this record.

Perform: The Search/Match process was not yet run for this record or the Search/Match process is set so that the record will be re-selected.

Post	The status of the record as the result of the post process. These values can be entered manually; however, some are entered by the system after processes are run, as described below: *Delete ID:* The system encountered an indication that the organization was deleted from the tape. Set by the system during the Search/Match process if it is unable to add data to a deleted organization. Can also be set manually. *Error:* The Post process encountered a problem. Set by the system during the Post process. *New ID Add:* The system was unable to find a match in the database and will add a record with a new ID when the Post process is run, provided that the system finds no matches and an ATP change code of *Add.* Set by the system during the Search/Match process if no match is found and a new one is added. *No Action:* This value is only added manually. It is not automatically entered by the system. If this value is entered, the Post and Purge processes ignore the record. Set manually. *Purge:* This value indicates that this suspense record is removed from the system during the Purge process. Set by the system during the Post process if the record is successfully processed. *Update ID:* The system found a matching ID in the database. This existing ID record is updated with the data from this ATP record during the Post process. Set by the system during the Search/Match process if a match is found in the database. *Wait Search:* This record is in the Suspense Table and is waiting to be processed by the Search/Match process. Set by the system during the ATP Load External Data process.

Error Indicators

When the *Error* indicator appears in the Edit field in the Processing Options group box, the Error Indicators group box identifies the type of error.

Note. Correct errors on the appropriate page before running the Post process. When you make and save the correction, the system updates the Processing Options group box fields accordingly. For example, if the Edit field value is *Error* and you fix the errors in the file so that the system now recognizes the data, when you save the change, the system changes the Edit field to *Complete.* You should always save before changing any of the processing options so that you can review the results of any data changes.

Name Error	When selected, indicates that the system could not recognize the name data.
Foreign Address Error	When selected, indicates that the system could not recognize the address data or that the country of the address is not in the database.

Change Code Options

Change Date

The system automatically displays the date when the ATP Load External Data process ran. You can change this date if necessary.

Change Code

Instructs the system what to do with the record loaded by the ATP Load External Data process. The system automatically displays the value of *Add* for each record loaded by the process.

Values for this field are delivered with the system. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Add: Add the record loaded by the ATP Load process to the database as a new record.

Change: Change the existing record to reflect the record loaded by the ATP Load process.

Delete: Delete the record loaded by the ATP Load process.

Search/Match Results

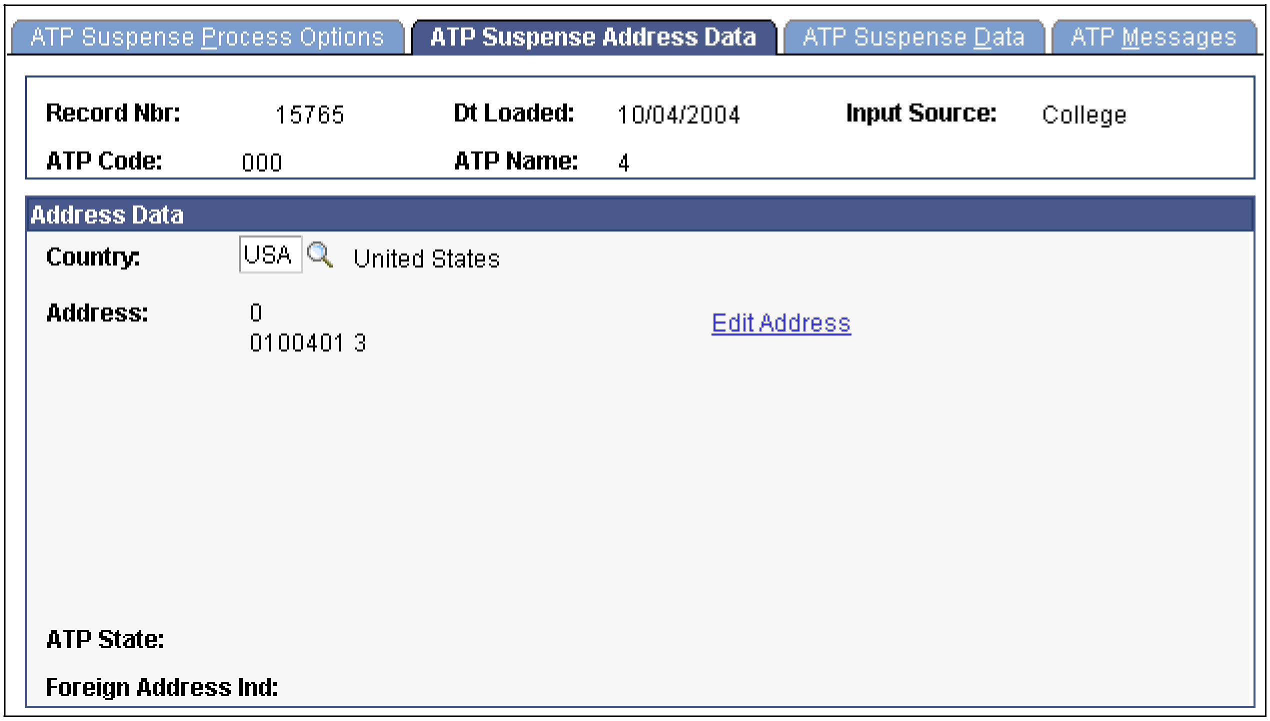
Matches

The number of matches that the Search/Match process found for this organization.

Note. You can view additional information about errors and other processing actions on the ATP Messages page.

Reviewing School Address Data

Access the ATP Suspense Address Data page (Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Address Data).

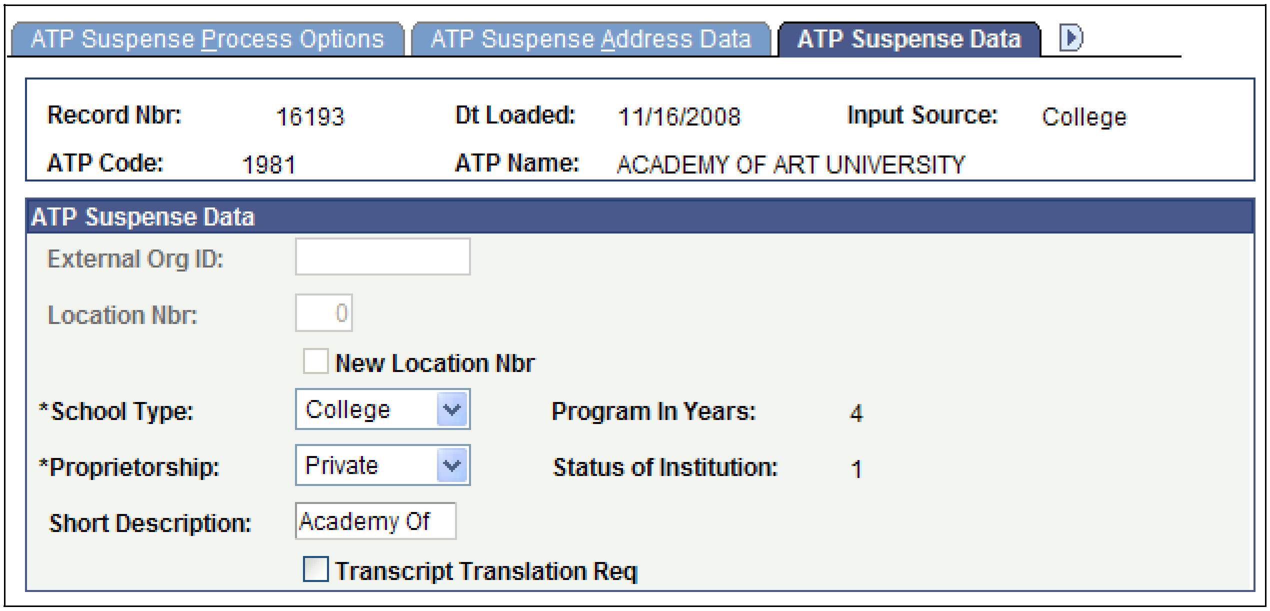


ATP Suspense Address Data page

The external data load provides the information on this page. You can change the address information if necessary.

Reviewing Other School Data

Access the ATP Suspense Data page (Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Suspense Data).



ATP Suspense Data page

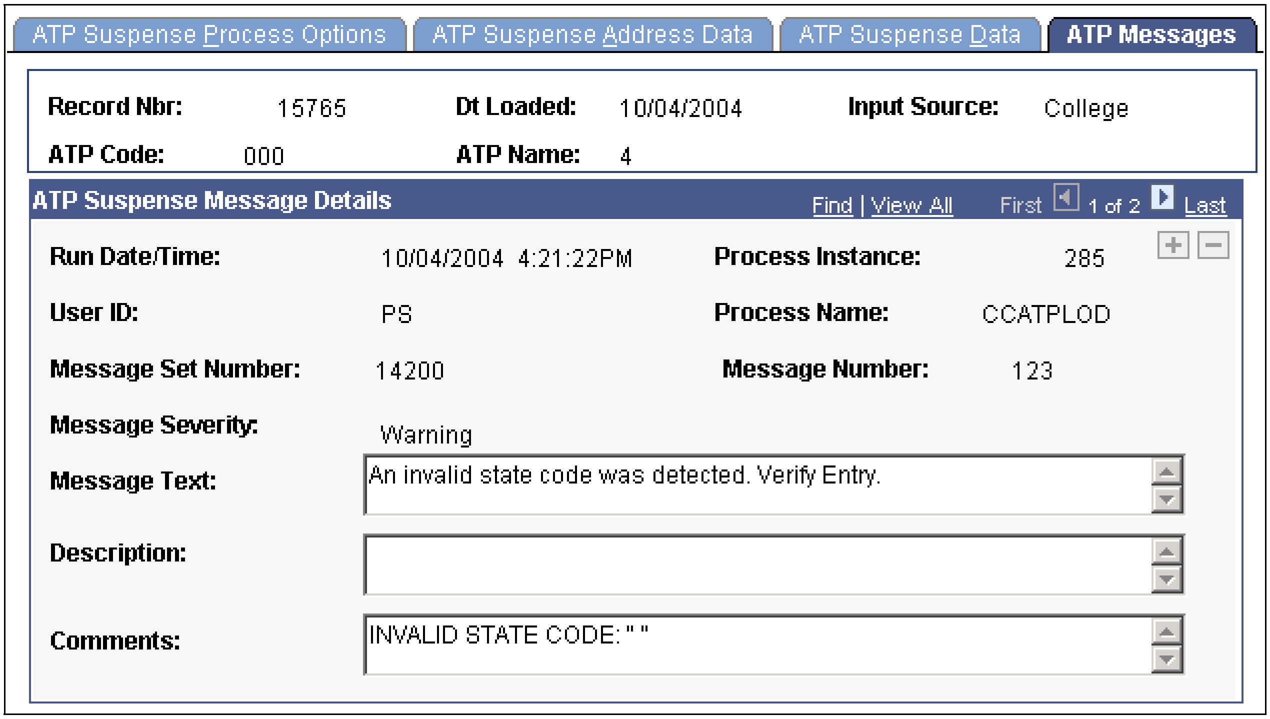
External Organization ID	The system displays the existing ID of the organization or, if none exists, assigns the next available new ID when you save.
Location Number	The address location number of this organization. The default location number when adding a new organization is one.
New Location Number	When selected, indicates that the system found that the organization exists in your database, but the location address was changed or added by the data load. You can overwrite the new location number by specifying a location number or clearing the New Location Number check box.
School Type	For the College data file, the system displays the school type if a value exists in the source file. For the Secondary School data file, the system displays the mapped LS School Type for the corresponding school type in the source file. You map the LS school types to ATP school types in the ATP School Type Table page.
Program In Years	For the College data file, the system displays the program in years if a value exists in the source file.
Proprietorship	For the College data file, the system displays the proprietorship if a value exists in the source file. If the College data file does not contain a value, the system sets the proprietorship value to *Other*. Values for this field are delivered with the system. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.
Status of Institution	For the College data file, the system displays the status of institution if a value exists in the source file.

Transcript Translation Required — When selected, indicates that the transcript from this organization needs to be translated.

For the Secondary School data file, the system does not display the Program in Years, Proprietorship, and Status of Institution values because these values do not exist in the source file.

Reviewing ATP Data Suspense Messages

Access the ATP Messages (Suspense) page (Campus Community, Organization, Organizations Data Load, ATP Suspense, ATP Messages).

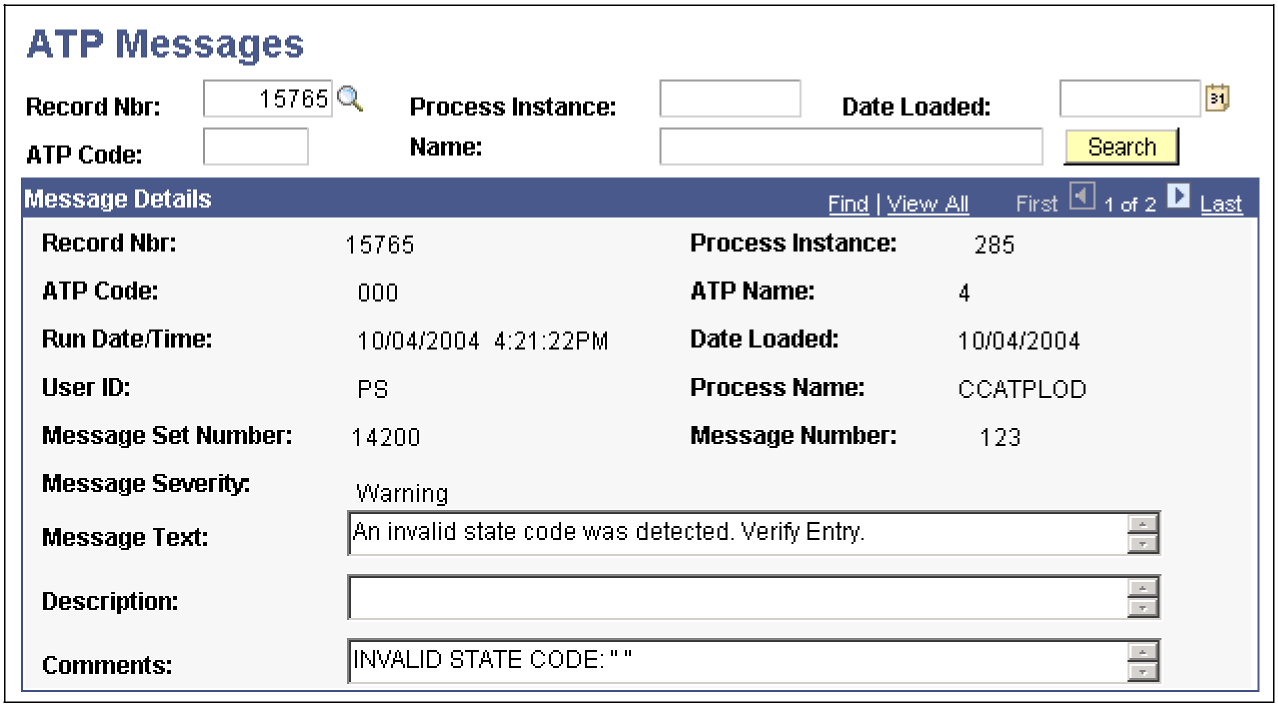


ATP Messages (Suspense) page

The ATP Messages (Suspense) page is for viewing purposes only. You cannot enter or modify data here.

Reviewing All ATP Messages

Access the ATP Messages page (Campus Community, Organization, Organizations Data Load, ATP Messages).

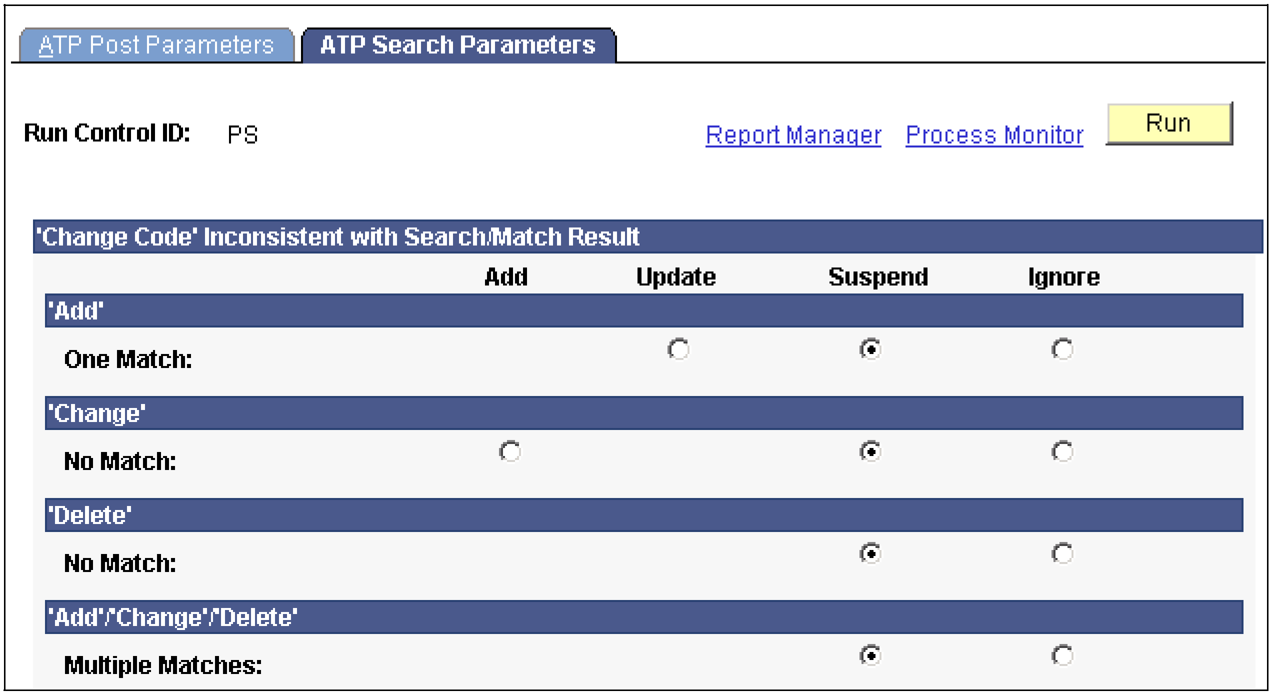


ATP Messages page

Enter any combination of record number, process instance (generated by the process scheduler), date loaded, and ATP code. Click the Search button to launch the search for all ATP messages based on the criteria you selected.

Specifying Search Parameters

Access the ATP Search Parameters page (Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Search Parameters).



ATP Search Parameters page

These values are common to each group box on this page:

Add Select for the system to automatically add the load data.

Update Select for the system to automatically overwrite the existing data with the new load data.

Suspend Select for the system to set the load data aside and post a message about it to the ATP Messages page until you can investigate further.

Ignore Select for the system to do nothing with the load data or to your database, but to continue with the ATP Search/Match process.

Add

One Match Select what you want the system to do (update, suspend, or ignore) when the change code is *Add* and the Search/Match process finds one match.

Change

No Match Select what you want the system to do (update, suspend, or ignore) when the change code is *Change* and the Search/Match process finds no match.

Delete

No Match

Select what you want the system to do (update, suspend, or ignore) when the change code is *Delete* and the Search/Match process finds no match.

Add/Change/Delete

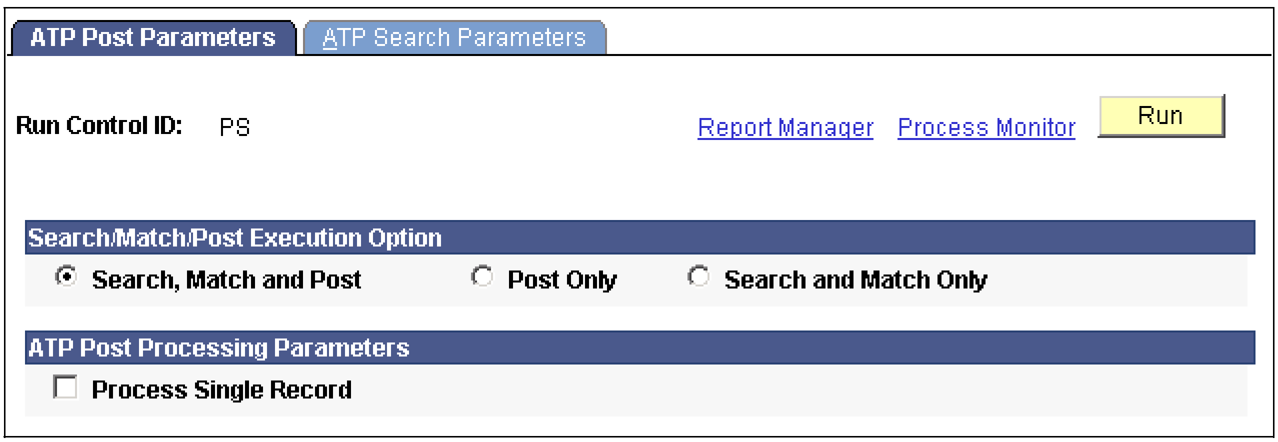
Multiple Matches

Select what you want the system to do (update, suspend, or ignore) when the change code is *Add*, *Change,* or *Delete* and the Search/Match process finds multiple matches.

Note. The Search/Match process used inside the ATP Search/Match/Post process is independent from Search/Match for organizations.

Searching for Duplicate Records and Posting the Data

Access the ATP Post Parameters page (Campus Community, Organization, Organizations Data Load, ATP Search/Match/Post, ATP Post Parameters).



ATP Post Parameters page

Search/Match/Post Execution Option

Select the processes to run: *Search, Match and Post, Post Only,* or *Search and Match Only.*

Note. If you choose to run either *Search, Match and Post*, or *Search and Match Only*, you should indicate the conflict parameters on the ATP Search Parameters page.

ATP Post Processing Parameters

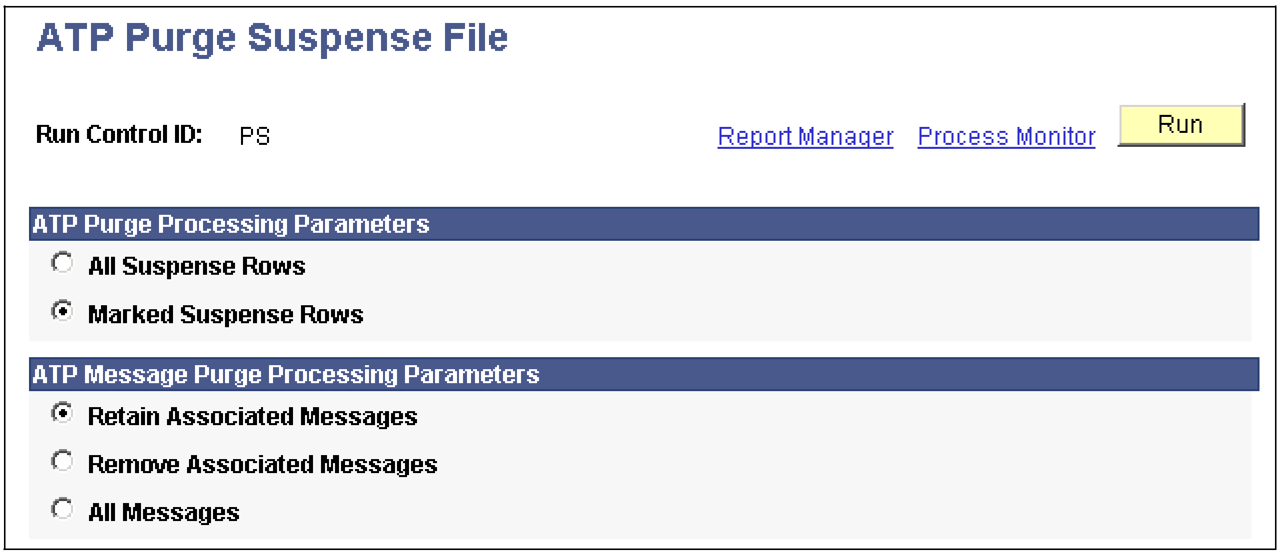
Process Single Record Select to set the specified process to run only on one record. You must specify the ATP record number for the school the system posts.

When you click Runand schedule the process, the PeopleSoft Process Scheduler runs the CCATPPST.SQR process and posts the ATP data.

Note. If you selected *Search, Match and Post*, or *Search and Match Only*, you should review messages on the ATP Messages page to investigate and resolve conflicts for which you set the search parameters to *Suspend.*

Purging ATP Data from the Suspense File

Access the ATP Purge Suspense File page (Campus Community, Organization, Organizations Data Load, ATP Purge Suspense File).



ATP Purge Suspense File page

ATP Purge Processing Parameters

All Suspense Rows Select to set the process to purge all records in the suspense tables.

Marked Suspense Rows Select to set the process to purge only those records marked *Purge* in the suspense file, as indicated in the ATP Suspense Process Options page.

ATP Message Purge Processing Parameters

Remove Associated Messages	Select to set the process to purge messages associated with the row of data selected by the Marked Suspense Rows option.
Retain Associated Messages	Select to set the process not to purge any messages associated with the row of data selected by the Marked Suspense Rows option.
All Messages	Select to set the process to purge all messages from the suspense files. You should select this option if you selected the All Suspense Rowsoption.

Loading External EPS Data

Use the EPS data load pages to load EPS market codes into the system similar to the way you load external ATP data. Some admissions offices use EPS market codes to focus their recruiting efforts in the geographic areas where they believe they will be the most successful.

Chapter 55

Managing Committee Data

This chapter lists prerequisites and discusses how to:

- Create a committee.
- Assign committee members.

Prerequisites

Before creating a committee, create a committee template and then use the template to create similar committees or committees for similar events.

Creating Committees

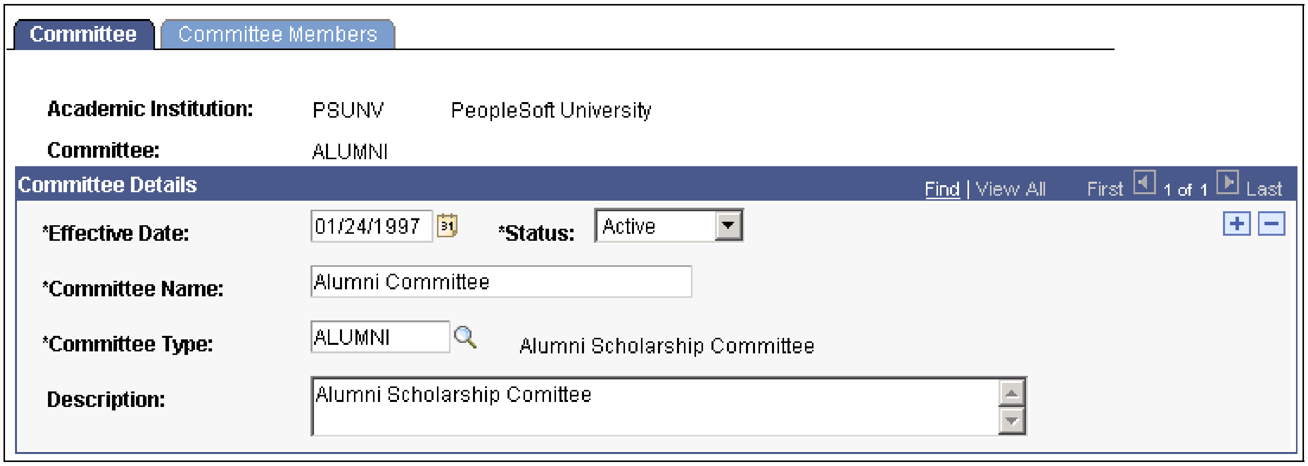
This section discusses how to create a committee.

Page Used to Create Committees

Page Name	***Definition Name***	***Navigation***	***Usage***
Committee	COMMITTEE	Campus Community, Committees, Manage Committees, Committee	Create or review a committee.

Creating a Committee

Access the Committee page (Campus Community, Committees, Manage Committees, Committee).



Committee page

Committee Details

Committee Name Enter a name for the committee.

Committee Type Select the type of committee, from the Committee Type/Roles page, that describes this committee.

Assigning Committee Members

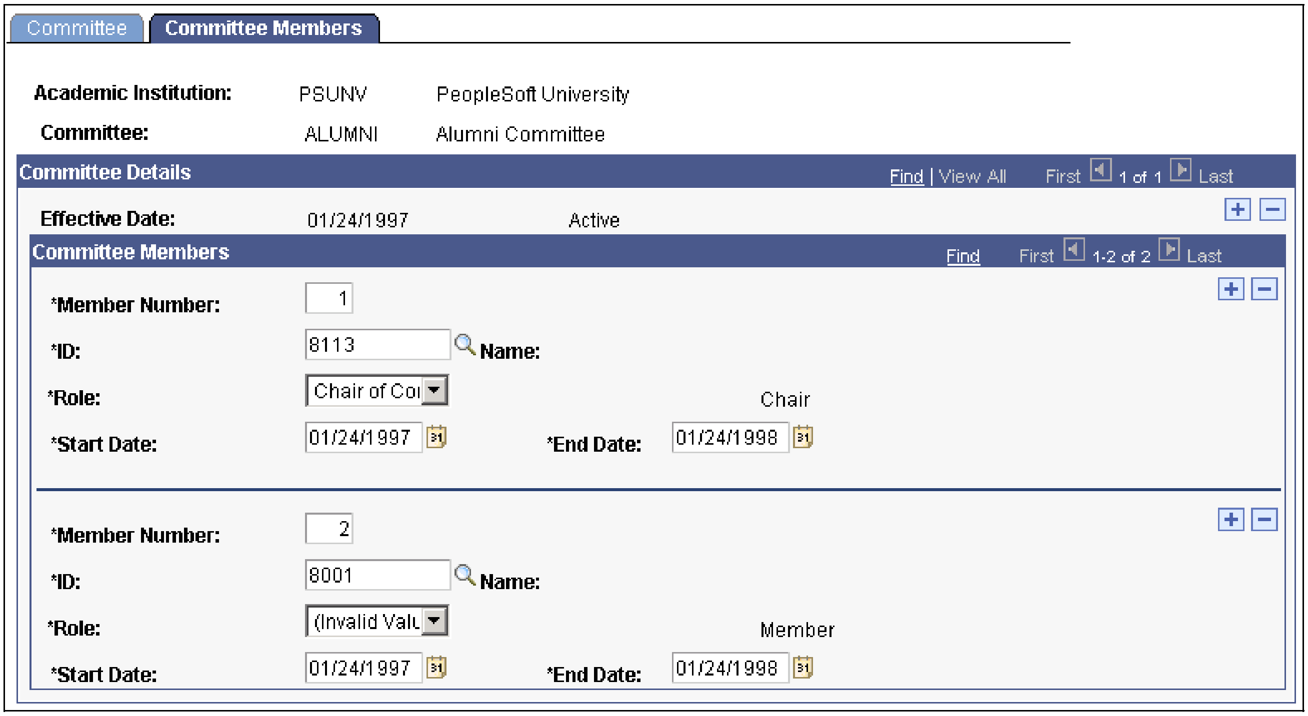
This section discusses how to assign members to a committee.

Page Used to Assign Committee Members

Page Name	*Definition Name*	*Navigation*	*Usage*
Committee Members	COMMITTEE_MEMBERS	Campus Community, Committees, Manage Committees, Committee Members	Assign individual members to a committee.

Assigning Members to a Committee

Access the Committee Members page (Campus Community, Committees, Manage Committees, Committee Members).



Committee Members page

Committee Members

Member Number

The number of this member in the list of members for this committee.

The system automatically enters the next sequential number for each member that you add. You can override the number manually to reorder the list of committee members.

ID

The ID of the individual assigned to this committee. The system displays the individual's name after you select the ID.

Role

The role assigned to this individual for this committee.

Start Date

The date when the member's participation in this committee is scheduled to begin.

End Date

The date when the member's participation in this committee is scheduled to end.

Chapter 56

Managing Campus Event Planning

This chapter provides an overview of campus event planning, lists common elements, and discusses how to:

- Create an event.
- Track event attendance.
- Review events, meetings, and attendees.

Understanding Campus Event Planning

You can use your system to help plan and manage campus events. A set of meetings comprises one overall event, and each meeting can have resources and staff assigned to it. For example, you could create an event called Orientation. Your template might include meetings such as a welcome reception, a general session, several workshops, and a tour of the campus. You can identify the required resources for each meeting (tables, chairs, brochures, banners, and so on), and assign and schedule the responsible staff.

Orientation, for example, is a recurring event, and each of the meetings might need the same resources and staff each time. You can create an Orientation event template to make it easier to regularly plan and manage this event. You can also use the template to plan similar events.

Courses are also events. You use event planning to assign classrooms, identify faculty, and schedule equipment for courses.

Note. Be careful not to confuse the events described in this chapter with 3C engine events. One attends the events described in this chapter; 3C engine events are data occurrences within the system.

You can use your system to get accurate counts of how many attendees you invited to an event, how many plan to attend, and how many actually attended.

You can identify attendees who are in your database versus those who are not. You can also add guests as attendees and associate them with the host attendee who invited them. Tracking guest information this way is especially useful in social situations. For example, if an attendee invites two coworkers who you know are key figures in the local community, you do not have to remember which attendee works with and invited them, you can check the list of attendees to find out.

Note. Attendees do not have to exist in your database to attend an event. However, if you want to add each attendee to your system, use the Biographical Information pages to create records and add them to your database. Adding attendees to your system enables you to include them in any confirmation, thank you, or other letter that you generate for the event.

Common Elements Used in This Chapter

Event ID The ID number for an event. When you create a new event on the Events page, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type Select the type, from the Event Types page prompt list, that describes the event.

Academic Institution The academic institution responsible for the event.

Event Manager The individual at your institution who is managing the event.

Event Meeting The number of each meeting in the list of meetings for an event. The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings are listed in the specified order.

Primary Meeting The primary meeting for the event. You can identify a primary meeting from the list of meetings for an event on the Event Template page. When you save the page, the system displays the event meeting number and corresponding meeting location for the primary meeting on the Event page.

Campus Coordinator The individual at your institution who is responsible for, or should be contacted about, this meeting.

Department Sponsor The department at your institution that is responsible for this meeting.

Manager The name of the responsible department's manager. The system displays the manager's name if one is associated with the department sponsor on the Department Profile page.

Attendee An individual who is invited or scheduled to attend any event meeting.

Guest Relationship The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required.

Creating an Event

This section lists prerequisites and discusses how to:

- Name an event.
- Add meetings to an event.
- Enter meeting details.
- Specify meeting sponsors.

- Enter the meeting location.
- Schedule meeting resources.
- Schedule meeting staff.

Prerequisites

Before creating events, define the types of events, staff, and resources. You might also find it helpful to set up general event templates from which to copy when creating specific events.

Set up internal departments and organization departments and contacts before designating event managers, sponsors, and contacts. You must set up facilities before you can designate event locations.

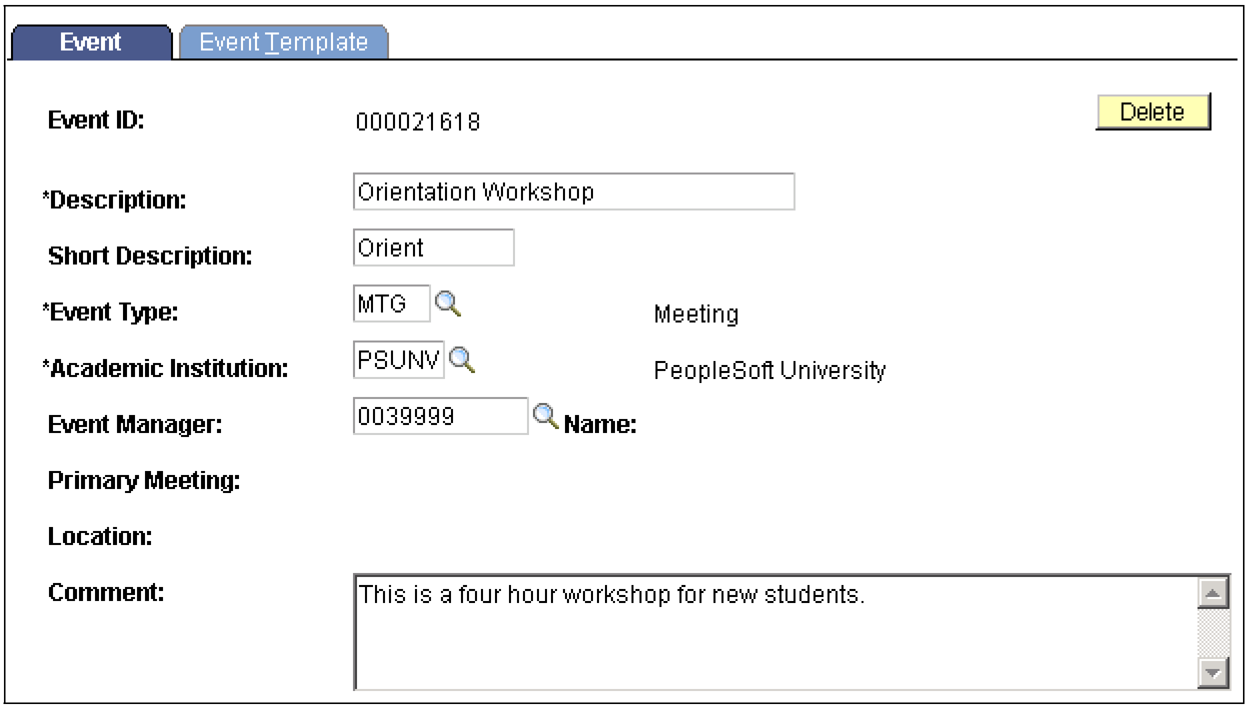
Pages Used to Create an Event

Page Name	***Definition Name***	***Navigation***	***Usage***
Event	CAMPUS_EVENT	Campus Community, Campus Event Planning, Event Management, Events, Event	Name an event, including selecting the event type and assigning the event manager.
Event Template	CAMPUS_MEETING	Campus Community, Campus Event Planning, Event Management, Events, Event Template	Specify event meetings.
Meeting Detail	CAMPUS_MEETING1	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Detail	Enter meeting details, including date, time, and anticipated attendance.
Meeting Sponsor	CAMPUS_MEETING2	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Sponsor	Enter meeting sponsor and contact information.
Meeting Location	CAMPUS_MEETING3	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Location	Enter meeting location information.
Meeting Resources	CAMPUS_MTG_RSRCES	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Resources	Schedule meeting resources.

Page Name	***Definition Name***	***Navigation***	***Usage***
Meeting Staff	CAMPUS_MTG_STAFF	Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Staff	Schedule meeting staff.

Naming an Event

Access the Event page (Campus Community, Campus Event Planning, Event Management, Events, Event).



Event page

Event ID

When you create a new event, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.

Event Type

The type, from the Event Types page, that describes this event.

Academic Institution

The academic institution responsible for this event.

Event Manager

The individual at your institution who is managing this event.

Primary Meeting

After you identify a primary meeting for this event on the Event Template page and save that page, the system displays the number of that meeting here. The system displays the location for the meeting in the Location field.

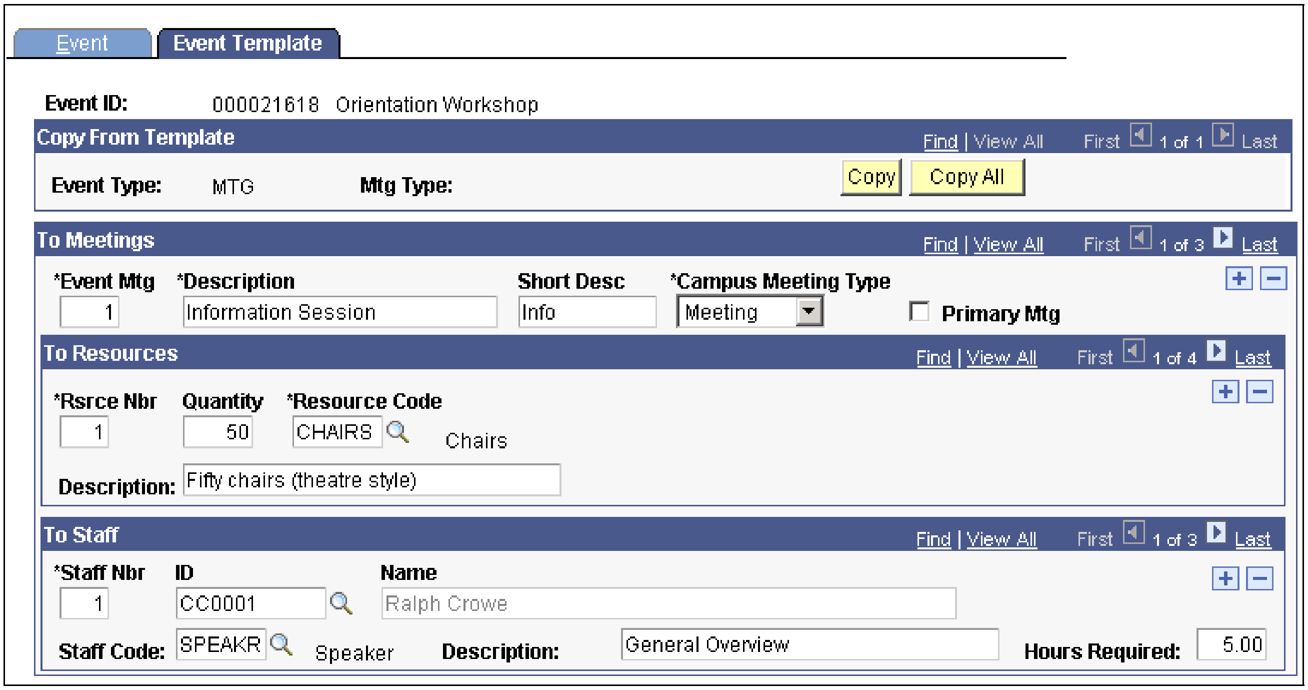
Comment

Comments to further identify or describe this event.

Delete Click this button to delete this event from your database.

Adding Meetings to an Event

Access the Event Template page (Campus Community, Campus Event Planning, Event Management, Events, Event Template).



Event Template page

Note. You can also add meetings to an event on the Meeting Details page.

Copy From Template

If meetings, resources, and staff templates exist for the selected event type (from the meeting Template page, Meeting Resource Templates page, and Meeting Staff Template page), the system displays that data here. You can click either the Copy or Copy All button to copy the information from those templates to this event. If no template exists, no data appears here and you must add the meetings and assign the resources and staff for this event.

Copy Click this button to copy each meeting set up for the event type selected with its resources and staff. You can manually change any of the copied information.

Copy All Click this button to copy all the meetings with their resources and staff. You can manually change any of the copied information.

Note. The Copy All button is especially helpful if, for example, if you have the same event each year. Instead of entering the information each time, you can click this button to copy all information from the template and update the information for the current year's event.

To Meetings

Primary Meeting When selected, indicates that this is the primary meeting for this event.

To Resources

Add the resources and quantity that you need for this meeting. You can also add a brief description.

To Staff

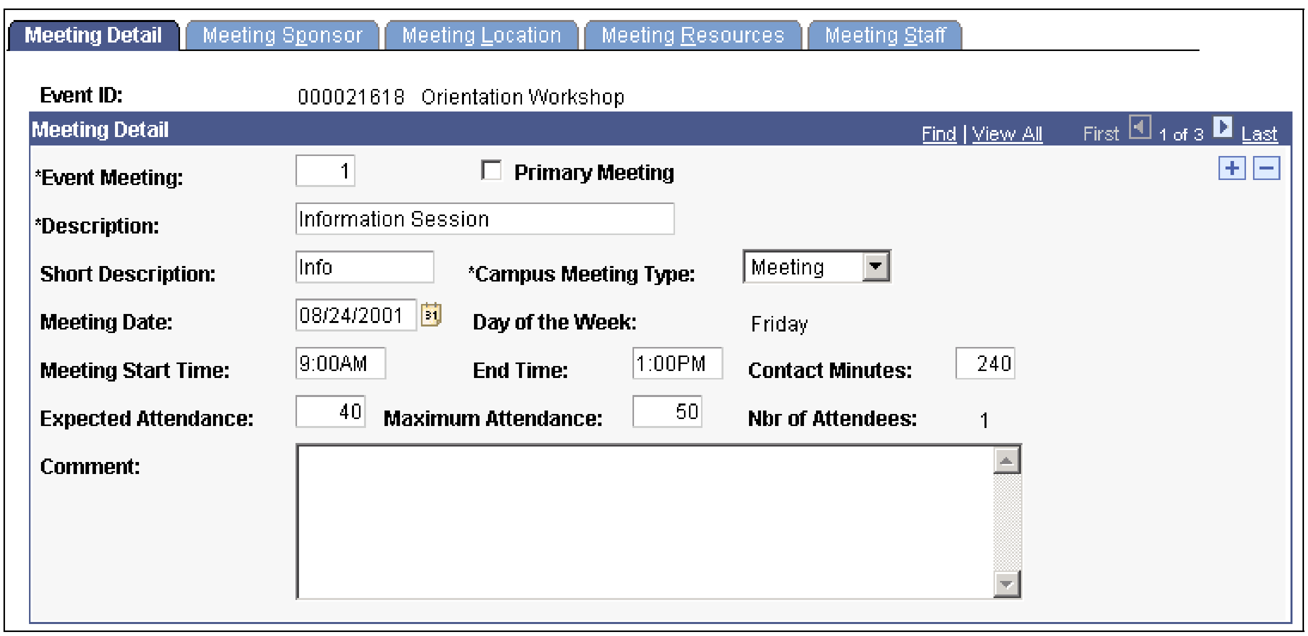
ID The ID of the individual responsible for this task.

Hours Required The number of hours that the assigned individual is required to perform or participate in this task.

You can also add a brief task description.

Entering Meeting Details

Access the Meeting Detail page (Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Detail).



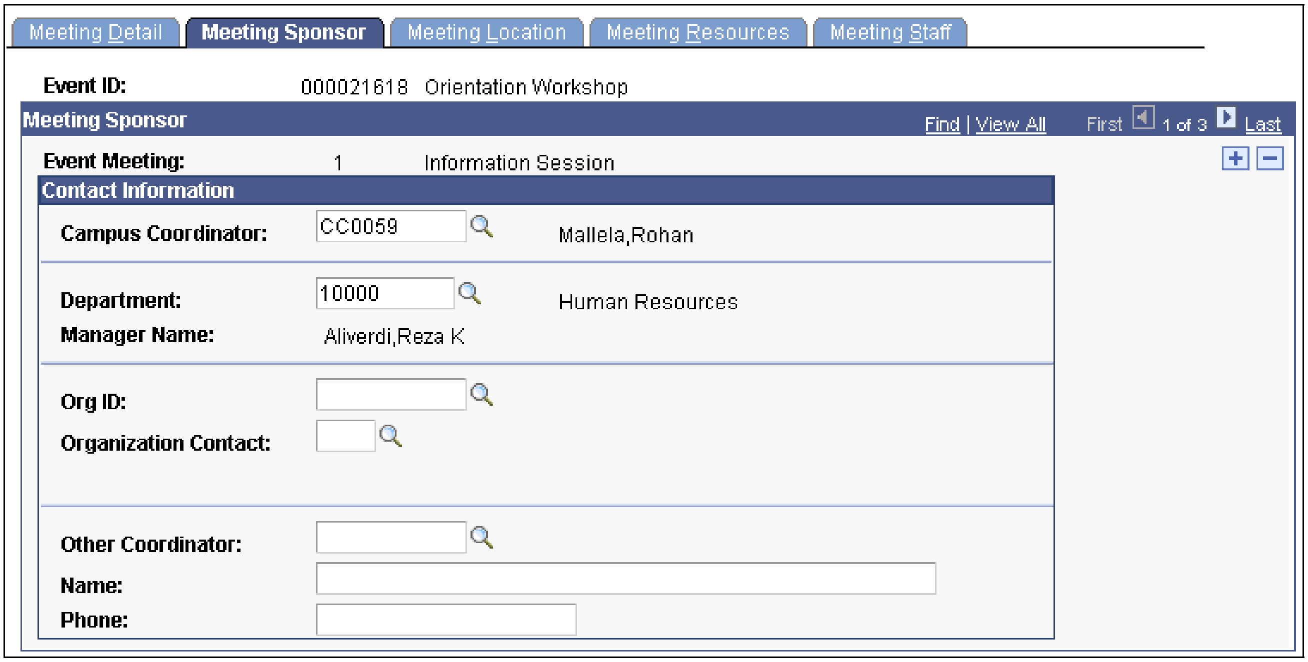
Meeting Detail page

Meeting Detail

Event Meeting	The number of this meeting in the list of meetings for this event. The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.
Primary Meeting	When selected, indicates that this is the primary meeting for this event.
Campus Meeting Type	The meeting type that best describes this meeting. Values for this field are delivered with the system. You can modify these.
Meeting Date	The date when this meeting is scheduled to occur.
Day of the Week	The day of the week when this meeting is scheduled to occur. The system automatically displays the day of the week when you exit the *Meeting Date* field.
Meeting Start Time	The time when this meeting is scheduled to begin. The system assumes the time is *AM.* If not, you must enter *PM.*
End Time	The time when this meeting is scheduled to end. The system assumes the time is *AM.* If not, you must enter *PM.*
Contact Minutes	The length or duration of this meeting. The system calculates the contact time based on the meeting start and end times. The system recalculates the contact minutes each time that you change the start or end time. You can override the calculated minutes value.
Expected Attendance	The number of attendees expected at this meeting.
Maximum Attendance	The maximum number of attendees that can be accommodated at this meeting.
Number of Attendees	The number of attendees invited to this meeting. The system displays the number of invited attendees assigned to this meeting on the Event Attendees page.
Comments	Comments to further identify or describe this meeting.

Specifying Meeting Sponsors

Access the Meeting Sponsor page (Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Sponsor).



Meeting Sponsor page

Contact Information

Campus Coordinator The individual at your institution who is responsible for, or should be contacted about, this meeting.

Department Sponsor The department at your institution that is responsible for this meeting.

Manager Name The name of the responsible department's manager. The system displays the Manager field and manager's name only if a manager is associated with this department on the Department Profile page.

Organization ID The organization that is responsible for or is sponsoring this meeting.

Organization Contact The individual in the responsible organization who you should contact about this meeting.

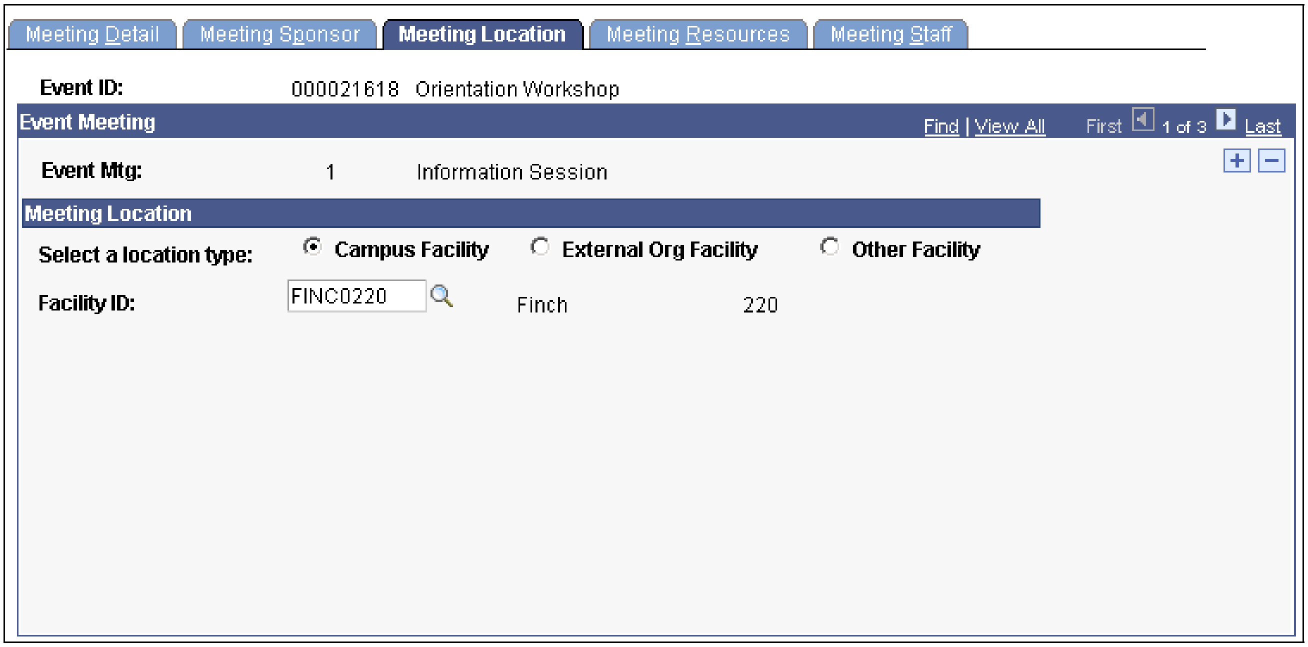
Other Coordinator The additional individual at your institution who is responsible for, or can be contacted about, this meeting.

Name The name of the additional contact person if the individual does not exist in your database.

Phone The phone number of the additional contact person if the individual does not exist in your database.

Entering the Meeting Location

Access the Meeting Location page (Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Location).



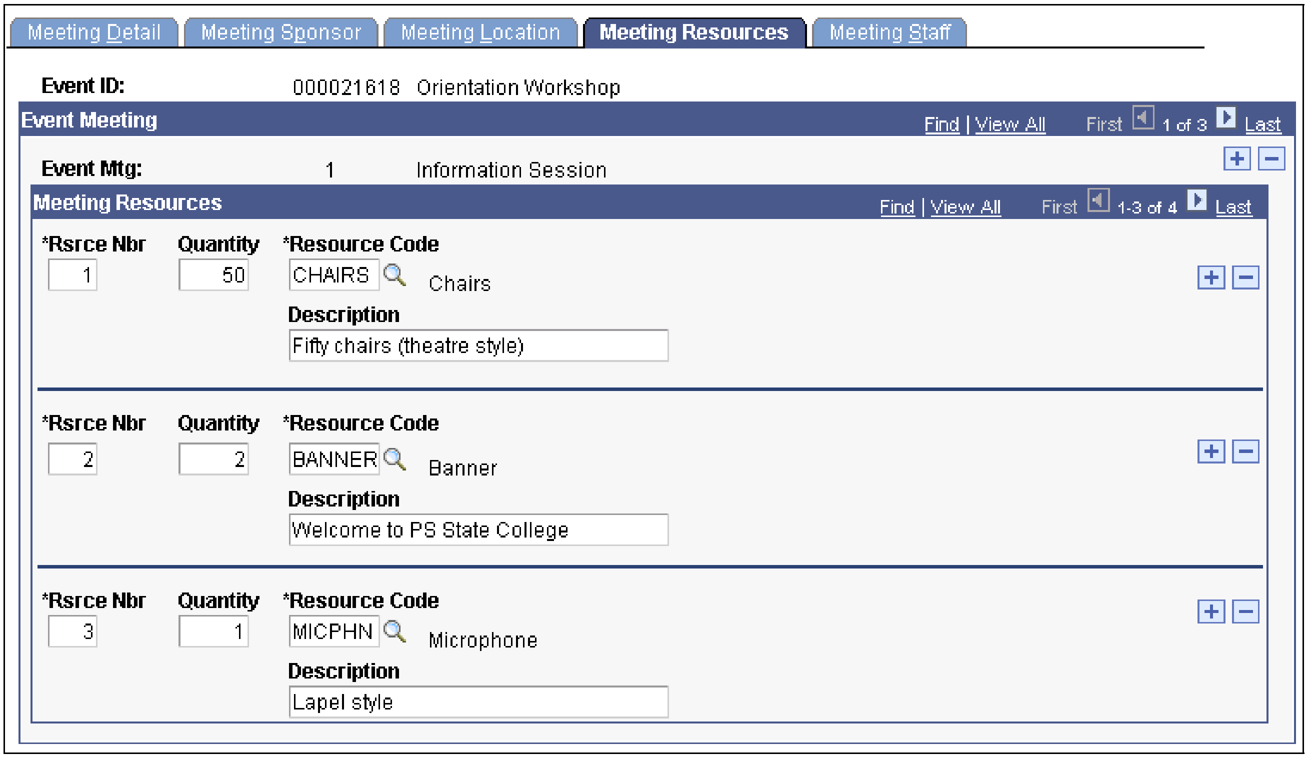
Meeting Location page

Meeting Location

Campus Facility	When selected, indicates that the location for this meeting is a campus facility. When you select *Campus Facility*, the system provides the Facility ID field with a prompt list of facility IDs from the Facility Table page.
External Organization Facility	When selected, indicates that the location for this meeting is a facility at or arranged by an external organization. When you select the External Org Facility option, the system displays the organization ID and description from the Meeting Sponsor page and provides the External Org Location field with a prompt list of locations for the organization from the Organization Locations page. When you select a location number, the system displays the address for that location.
Other Facility	When selected, indicates that the location for this meeting is a facility other than at your campus or at an external organization in your database. When you select the Other Facility option, the system displays address fields for you to identify the address or location of the facility.

Scheduling the Meeting Resources

Access the Meeting Resources page (Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Resources).



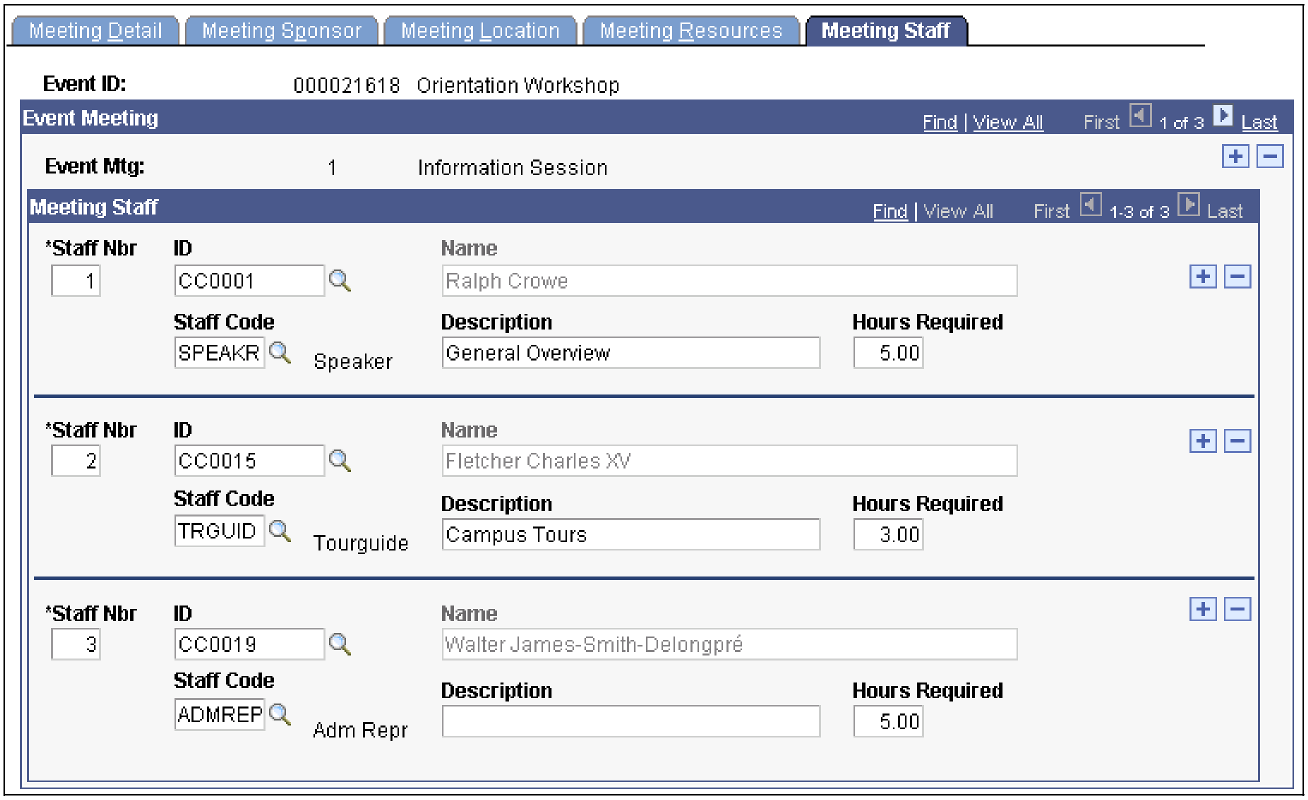
Meeting Resources page

Meeting Resources

Resource Number	The number of this resource in the list of resources for this meeting. The system automatically enters the next sequential number for each resource that you add. You can override the number to reorder the list of resources. When you return to the page, the resources are in the specified order.
Quantity	The number or quantity of the resource required for this meeting.
Resource Code	The type of resource, from the Resource Codes page, required for this meeting.
Description	A brief description to further identify or describe this resource.

Scheduling Meeting Staff

Access the Meeting Staff page (Campus Community, Campus Event Planning, Event Management, Meetings, Meeting Staff).



Meeting Staff page

Meeting Staff

Staff Number

The number of this staff person in the list of staff required for this meeting.

The system automatically assigns the next sequential number to each staff member that you add. You can override these numbers to rearrange the order of the staff. When you return to the page, the staff members are in the specified order.

ID

The ID of the staff member responsible for this task.

Name

The system automatically displays the individual's name when you select the ID.

If the individual does not have an ID in your system, you can enter his or her name in this field.

Staff Code

The type of staff required for this meeting.

Description	The task that the staff member is required to perform or participate in for this meeting.
Hours Required	The number of hours that the responsible individual is required to perform or participate in for this task.

Tracking Event Attendance

This section discusses how to:

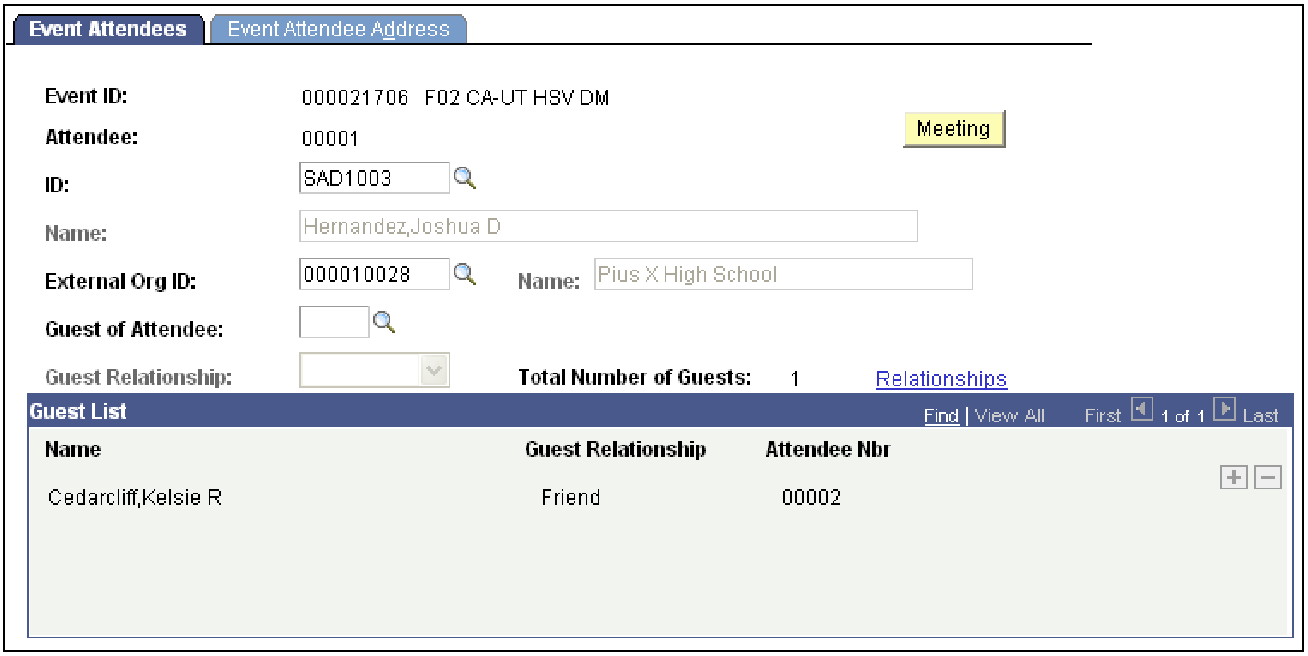
- Identify attendees and guests.
- Specify meetings for an attendee and review attendance status.
- (Optional) Enter an attendee's address.

Pages Used to Track Event Attendance

Page Name	***Definition Name***	***Navigation***	***Usage***
Event Attendees	EVENT_ATTENDEE	Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendees	Identify individuals invited or scheduled to attend an event, and specify their guest relationships, if any.
Attendee Meetings	EVENT_MEETING1_SEC	Click the Meeting button on the Event Attendees page.	Identify the meetings to which an attendee is invited and the status of his or her attendance.
Event Attendee Address	EVENT_ATND_ADDR	Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendee Address	Enter and track attendee addresses for an event.

Identifying Attendees and Guests

Access the Event Attendees page (Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendees).



Event Attendees page

Attendee

The number of this individual on the list of attendees for this event. For example, attendee 00015 is the 15th attendee on the list of attendees in the system for this event.

Note. If you are entering an attendee for the first time, the Attendee field is all zeros. Do not override this value. After you enter data and save the page, the system assigns and displays the next sequential attendee number.

Meeting

Click to access the Attendee Meetings page, where you can identify the meetings to which the attendee is invited.

ID

The attendee's ID, if he or she exists in your database.

Name

When you select the attendee's ID, the system automatically displays the individual's name here.

If the attendee does not exist in your database, you must enter the attendee's name here.

External Organization ID

The organization's ID, if the attendee is from an organization in your database.

Name

When you select the organization's ID, the system automatically displays the organization's name here.

If the organization does not exist in your database, you must enter the organization's name here.

Guest of Attendee

The attendee number of the individual whose guest this individual is. An attendee can have multiple guests.

Note. You must first create guests as new entries on the list of attendees. You can then select them from that list and associate them as guests of the attendee described on this page.

Guest Relationship

The relationship between the host attendee and the guest attendee. If a guest is identified, the guest relationship is required. If you do not know the relationship, select *Unknown.*

When you save the page, the system lists all guests of the host attendee at the bottom of this page.

Values for this field are delivered with the system. You can modify these.

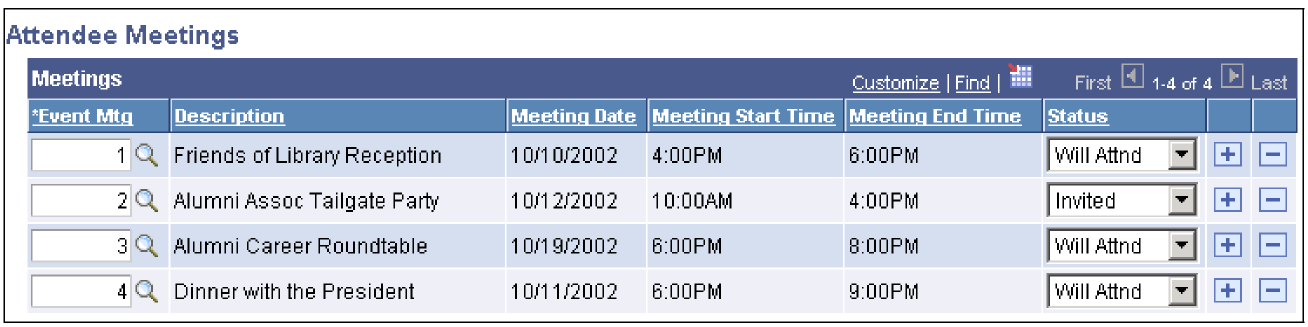
Relationships

Click this link to access the Relationships search box page, where you can create or review a relationship between two individuals in your database.

Guest Relationship values are independent of the relationships that you set up on the Relationships page. Guest relationship is a quick method of identifying the association between two attendees specifically for an event.

Specifying Meetings for an Attendee and Reviewing Attendance Status

Access the Attendee Meetings page (click the Meeting button on the Event Attendees page).



Attendee Meetings

Meetings — Customize | Find | First 1-4 of 4 Last

*Event Mtg	Description	Meeting Date	Meeting Start Time	Meeting End Time	Status
1	Friends of Library Reception	10/10/2002	4:00PM	6:00PM	Will Attnd
2	Alumni Assoc Tailgate Party	10/12/2002	10:00AM	4:00PM	Invited
3	Alumni Career Roundtable	10/19/2002	6:00PM	8:00PM	Will Attnd
4	Dinner with the President	10/11/2002	6:00PM	9:00PM	Will Attnd

Attendee Meetings page

Meetings

Event Meeting

The number of the meeting to which you want to invite the attendee.

When you select the meeting, the system automatically displays the description, date, and start and end times for that meeting from the Meeting pages.

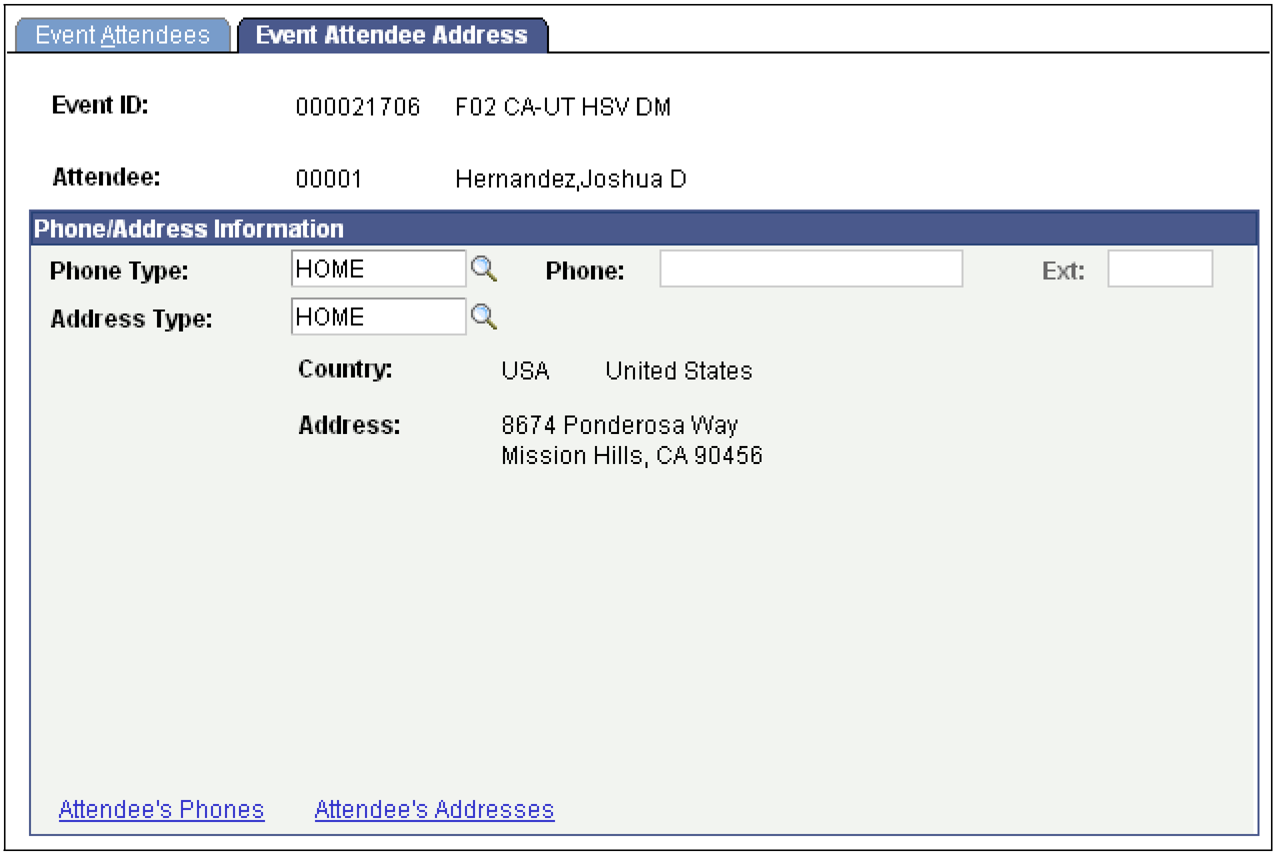
Status

The status of the individual's attendance for this meeting. Status values are *Attended*, *Invited*, *Not Attend*, and *Will Attend.*

Values for this field are delivered with the system. Do not modify these values in any way. Any modifications to these values could require substantial programming effort.

Entering an Attendee's Address (Optional)

Access the Event Attendee Address page (Campus Community, Campus Event Planning, Event Management, Event Attendance, Event Attendee Address).



Event Attendee Address page

Phone/Address Information

Phone Type

The phone number to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* phone type and home phone number associated with the home address specified on the Installation Table - SA Options page. You can select a different phone type.

If the attendee does not have an ID in your database, enter the phone number manually.

Address Type

The address to use for contacting this attendee.

If the attendee has an ID in your database, the system displays the *Home* address type and home address data specified on the Installation Table - SA Options page. You can select a different address type.

If the attendee does not have an ID in your database, enter the address manually.

Attendee's Phones

Click to access the Phone Number page, where you can add or edit the phone numbers for this attendee.

Attendee's Addresses

Click to access the Addresses page, where you can add or edit the address data for this attendee.

Reviewing Events, Meetings, and Attendees

After you enter campus events, you can review the information in several ways. You can review events by facility, review all meetings or all attendees for an event, or review attendees for a meeting. You can even search meetings and events to determine if a specific individual is an attendee.

This section discusses how to:

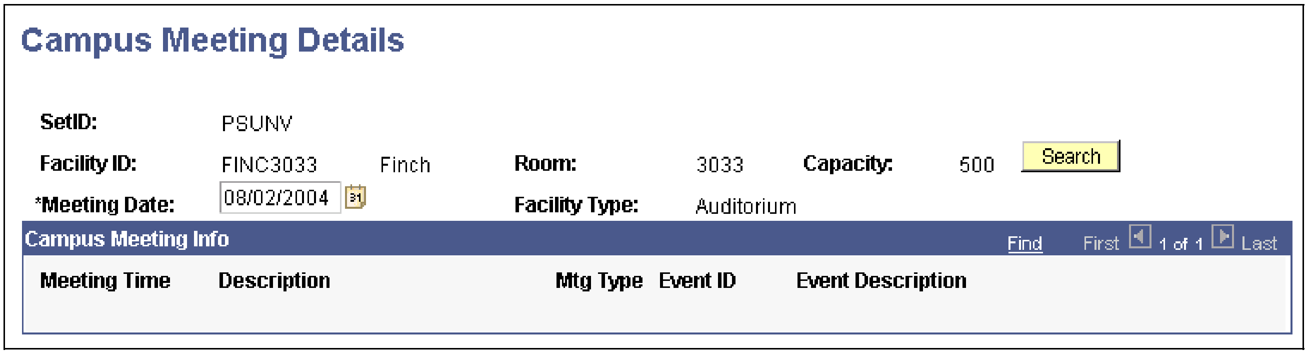
- Review events by facility and meeting date.
- Review event meetings.
- Review attendees for an event.
- Review attendees by meeting.
- Review event meetings for an attendee.
- Review an attendee's event summary.
- Review an attendee's event meetings summary.
- Review an attendee's guests.

Pages Used to Review Events, Meetings, and Attendance

Page Name	***Definition Name***	***Navigation***	***Usage***
Campus Meeting Details	CAMPUS_MTG_DSPL	Campus Community, Campus Event Planning, View Event Information, Campus Meeting Details	Review events by facility and meeting date.
Event Meeting	CAMPUS_ATT_SUM_INI	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting	Review all meetings for an event.
Event Attendee	CAMPUS_MTG_ATT_INI	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee	Review all attendees for an event.
Event Meeting Attendees	ATTENDEE_SUMMARY	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting Attendees	Review attendees for meetings of an event.
Event Attendee Meeting	ATTENDEE_MTG_SUM	Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee Meeting	Review meetings scheduled for specific attendees.
Person Event Summary	PERSON_EVENT_SUMM	Campus Community, Campus Event Planning, View Event Information, Person Event Summary	Review all of the events for which an individual is an attendee. This information is useful for viewing a summary of the individual's meeting schedule.
Attendee Meetings	EVENT_MEETING2_SEC	Click the Meeting button on the Person Event Summary page.	Review the specific meetings that an individual is scheduled to attend at an event.
Attendee Guests	ATTENDEE_GUEST_SEC	Click the Guest button on the Person Event Summary page.	Review all guests assigned to an individual for an event.

Reviewing Events by Facility and Meeting Date

Access the Campus Meeting Details page (Campus Community, Campus Event Planning, View Event Information, Campus Meeting Details).



Campus Meeting Details page

Meeting Date

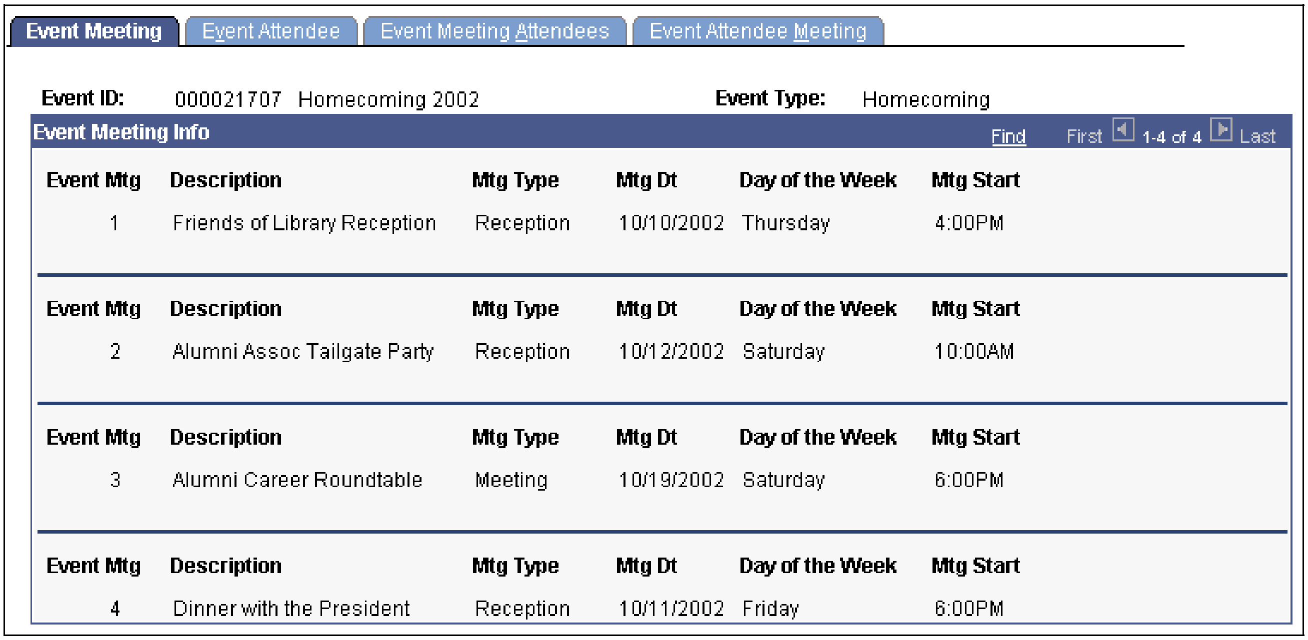
The calendar date to review to determine if any meetings are scheduled for this facility.

Search

Click this button to launch the search for meetings scheduled for the specified calendar date. If the system finds meetings scheduled for that date, it displays the data in the Campus Meeting Info scroll area at the bottom of the page.

Reviewing Event Meetings

Access the Event Meeting page (Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting).



Event Meeting page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees for an Event

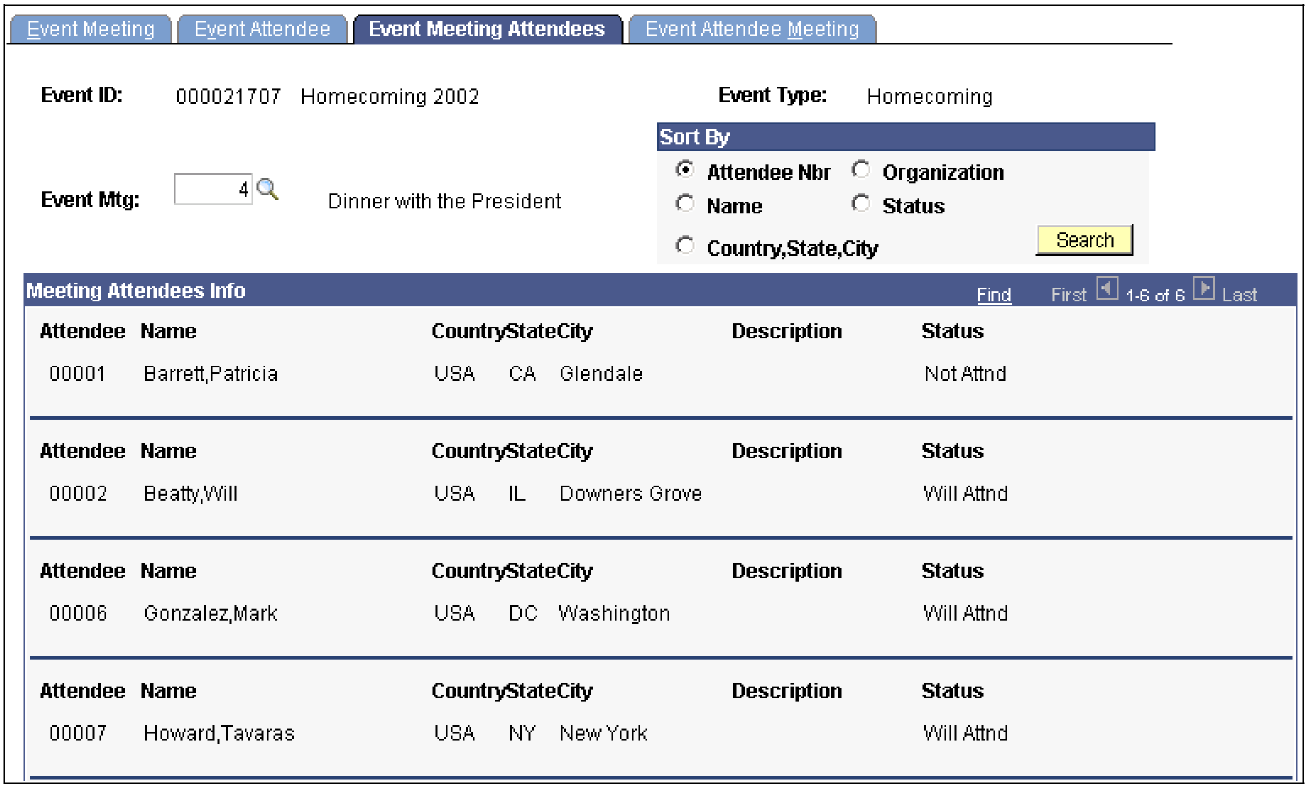
Access the Event Attendee page (Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee).

Event Attendee page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing Attendees by Meeting

Access the Event Meeting Attendees page (Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Meeting Attendees).



Event Meeting Attendees page

Event Meeting The number of the meeting whose attendees you want to review. An event meeting number is required.

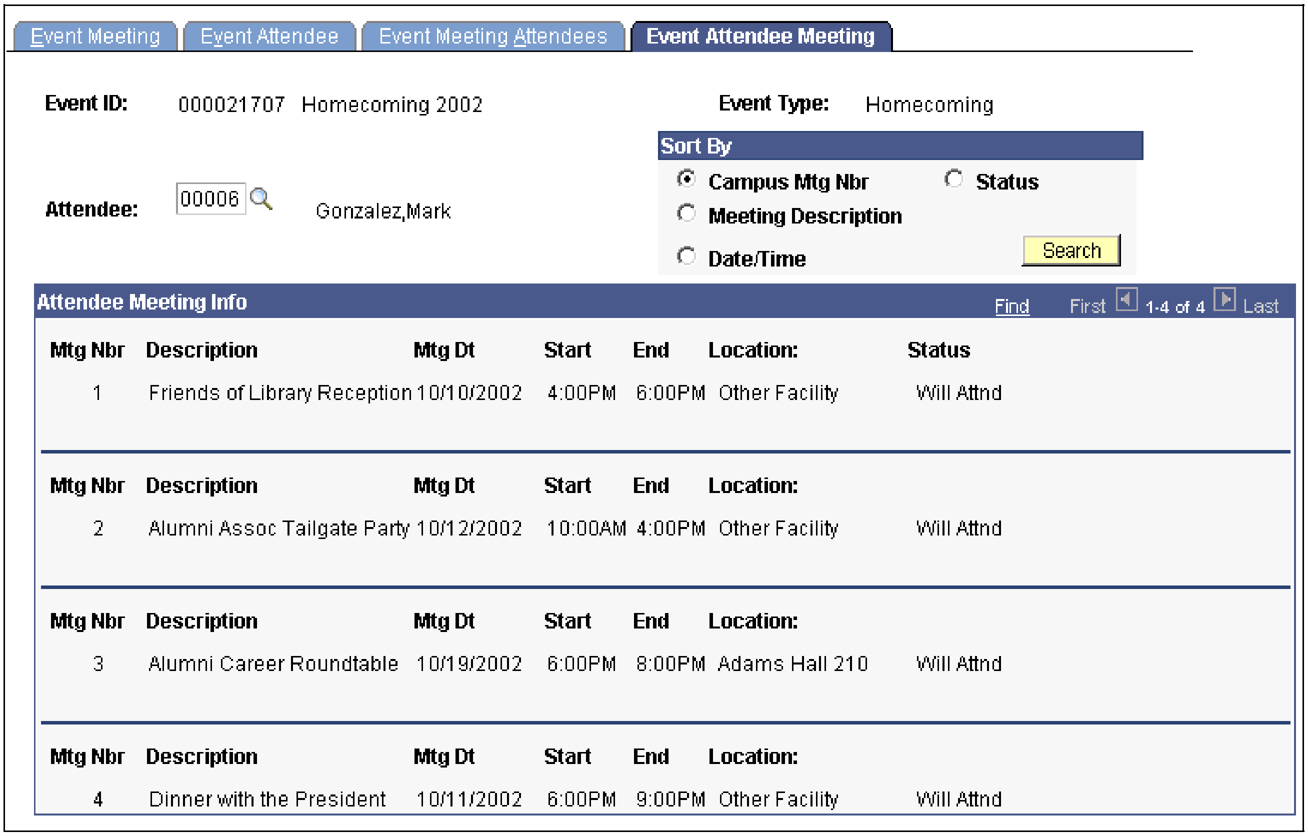
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria that you selected.

Reviewing Event Meetings for an Attendee

Access the Event Attendee Meeting page (Campus Community, Campus Event Planning, View Event Information, Event Summary, Event Attendee Meeting).



Event Attendee Meeting page

Attendee The attendee number of the attendee whose meetings you want to review. An attendee number is required.

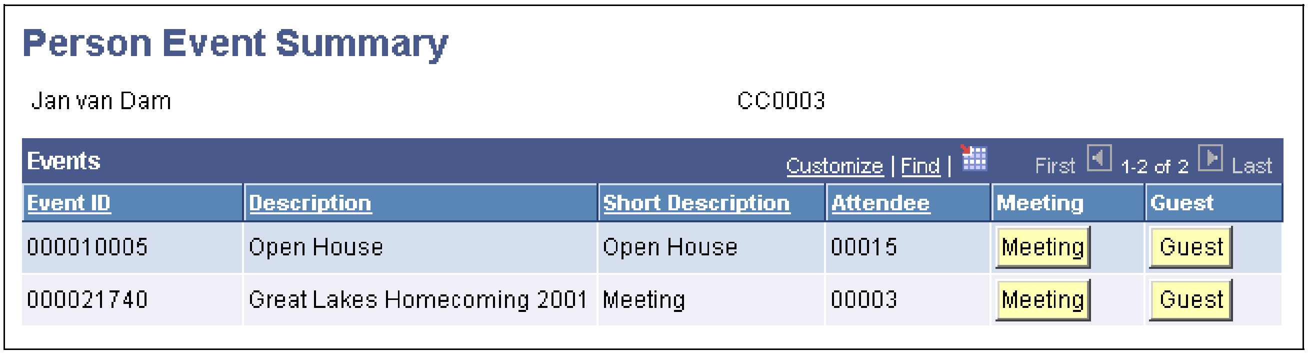
Sort By

Select how you want the system to sort the results.

Search Click this button to launch the search based on the criteria you selected.

Reviewing an Attendee's Event Summary

Access the Person Event Summary page (Campus Community, Campus Event Planning, View Event Information, Person Event Summary).



Person Event Summary

Jan van Dam CC0003

Events — Customize | Find | First 1-2 of 2 Last

Event ID	Description	Short Description	Attendee	Meeting	Guest
000010005	Open House	Open House	00015	Meeting	Guest
000021740	Great Lakes Homecoming 2001	Meeting	00003	Meeting	Guest

Person Event Summary page

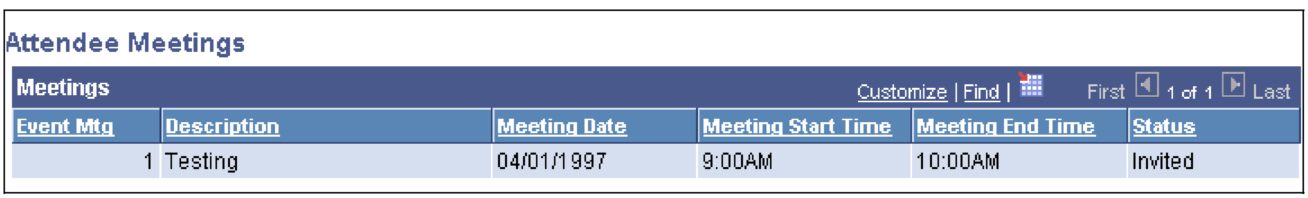
This page is for viewing purposes only. You cannot enter or modify data here.

Meeting Click to access the Attendee Meetings page, where you can view the specific meetings that the individual is scheduled to attend at an event.

Guest Click to access the Attendee Guests page, where you can view all guests assigned to this individual for an event.

Reviewing an Attendee's Event Meetings Summary

Access the Attendee Meetings page (click the Meeting button on the Person Event Summary page).



Attendee Meetings

Meetings — Customize | Find | First 1 of 1 Last

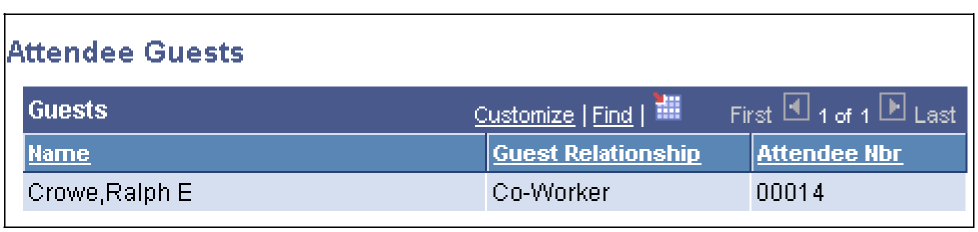
Event Mtg	Description	Meeting Date	Meeting Start Time	Meeting End Time	Status
1	Testing	04/01/1997	9:00AM	10:00AM	Invited

Attendee Meetings page

This page is for viewing purposes only. You cannot enter or modify data here.

Reviewing an Attendee's Guests

Access the Attendee Guests page (click the Guest button on the Person Event Summary page).



Attendee Guests

Guests — Customize | Find | First 1 of 1 Last

Name	Guest Relationship	Attendee Nbr
Crowe,Ralph E	Co-Worker	00014

Attendee Guests page

This page is for viewing purposes only. You cannot enter or modify data here.

Chapter 57

Managing External System Data About an Individual or Organization

This chapter provides and overview of external system data and discusses how to:

- Define external systems.
- Enter external system IDs.

Understanding External System Data

External system data is data tracked by any system outside of the PeopleSoft database. For example, an external system might track all exchange students or individuals entering the country on a student visa, or it might track all charitable organizations that offer academic achievement scholarships.

You can define codes for the external systems of interest to your institution. You can also enter and track IDs from those systems for individuals and organizations.

Defining External Systems

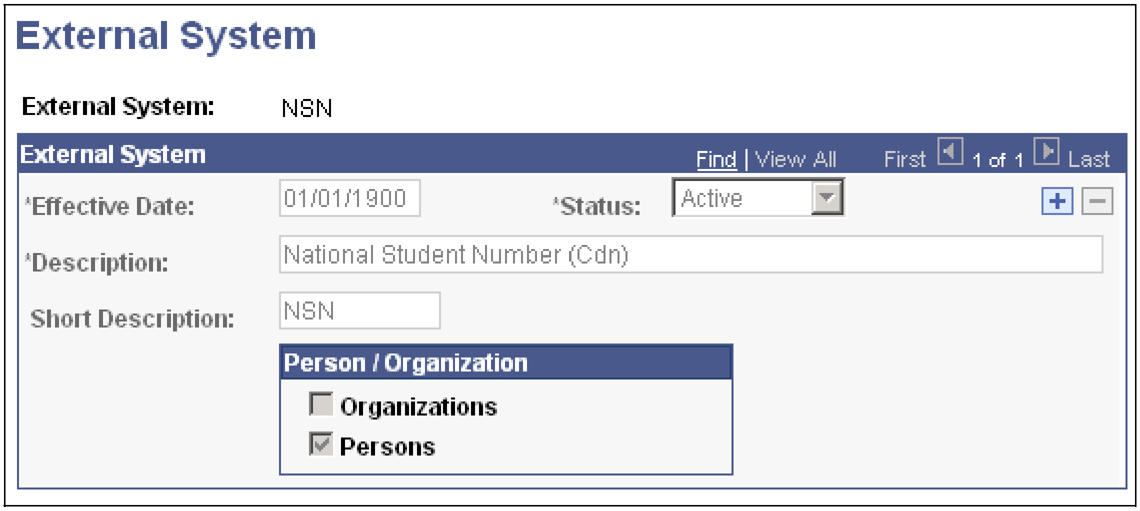
This section discusses how to define an external system for a person or organization.

Page Used to Define External Systems

Page Name	***Definition Name***	***Navigation***	***Usage***
External System	SCC_EXT_SYS_TBL	Set Up SACR, Product Related, Campus Community, Define Campus Community, Set Up, Define External Systems	Identify the external system and specify if it is associated with an individual, an organization or both.

Defining an External System for a Person or Organization

Access the External System page (Set Up SACR, Product Related, Campus Community, Define Campus Community, Set Up, Define External Systems).



External System page

External System

Description	Enter the name of the external system.

Person/Organization

Organizations and **Persons**	Identify the external system as related to organizations, individuals, or to both. When you enter an external ID for an individual on the External System ID page, only the external systems identified here as related to persons are available, and when you enter an external ID for an organization, only the systems identified here as related to organizations are available.

Entering External System IDs

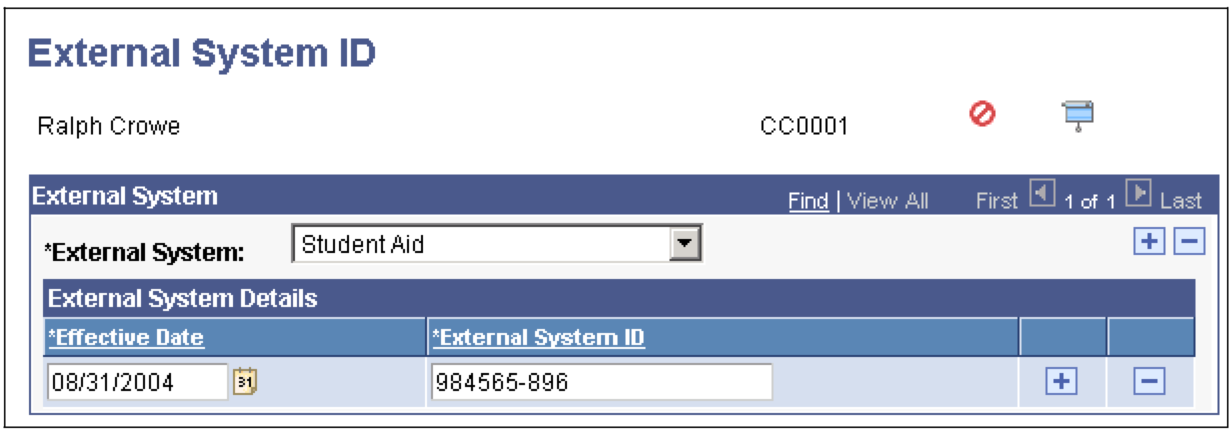
This section discusses how to enter external system IDs for a person or an organization.

Pages Used to Enter External System IDs

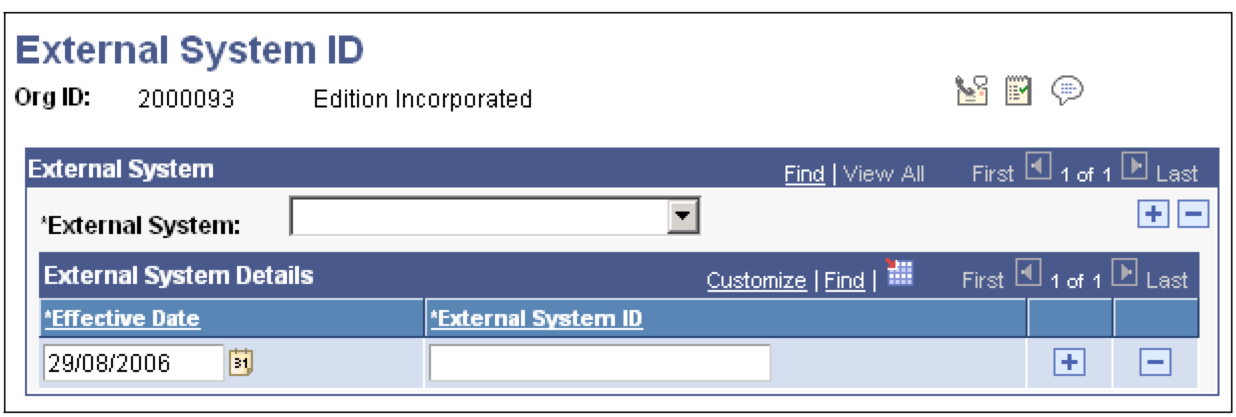
Page Name	*Definition Name*	*Navigation*	*Usage*
External System ID	SCC_ORG_EXT_SYS_ID	Campus Community, Personal Information, Identification, External System ID	Enter an external system ID for an organization.
External System ID	SCC_EXT_SYS_ID	Campus Community, Organization, Create/Maintain Organization, External System ID	Enter an external system ID for an individual.

Entering an External System ID for a Person or Organization

Access the External System ID page (Campus Community, Personal Information, Identification, External System ID).



External System ID page (as it appears for an individual)



External System ID page (as it appears for an organization)

External System

External System Select the external system that contains the ID that you want to enter.

External System Details

External System ID Enter the external system ID for the individual or organization depending which External System ID page you are using.

If the individual or organization has IDs for the external system, you can add them here.

Appendix A

Population Selection Process Queries and Equations

The PeopleSoft system delivers some predefined queries and Equation Engine equations for use with the Population Selection process. This document provides a list of those queries and equations that it delivers as of the date of this publication. Check with your department or system administrator to determine if your institution has created other queries or equations that you should use, or if additional queries or equations have been provided since the date of this publication.

The queries and equations listed in this document should be used as examples of how to create your own. They do not necessarily correspond to real business process transactions.

Queries for Population Selection

This table lists the queries that, as of the date of this publication, the PeopleSoft system delivers for use with the Population Selection process and the application processes where you can use them.

Query Name	***Description***	***Process***
QA_CS_AA_PS_AARPTRQST	Population Selection AA Report by Career	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_ACADLEVEL	AA Report Query by Acad Level	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_ADVISOR	AA Report Query by Advisor	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_CAREER	AA Report Query by Career	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_PROGPLAN	AA Report Query by Plan	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_PROGRAM	AA Report Query by Program	Generate Report Requests (SAA_RPT_RQST app engine)
SAA_RPT_STUDENT_GROUPS	AA Report Query by Student Grp	Generate Report Requests (SAA_RPT_RQST app engine)

Query Name	***Description***	***Process***
QA_CS_AD_PS_APPDEL_01	Population Selection query for batch Application Delete testing	Application Delete by Batch (SAD_APP_DEL app engine)
QA_CS_AD_PS_APPDEL_02	Population Selection query for batch Application Delete testing	Application Delete by Batch (SAD_APP_DEL app engine)
QA_CS_AD_PS_APPDEL_03	Population Selection query for batch Application Delete testing	Application Delete by Batch (SAD_APP_DEL app engine)
QA_CS_AD_PS_PROSDEL_01	Population Selection Query for Batch Prospect Delete Testing	Prospect Delete by Batch (SAD_PRS_DEl app engine)
QA_CS_AD_PS_PROSDEL_02	Population Selection Query for Batch Prospect Delete Testing	Prospect Delete by Batch (SAD_PRS_DEl app engine)
QA_CS_AD_PS_PROSDEL_03	Population Selection Query for Batch Prospect Delete Testing	Prospect Delete by Batch (SAD_PRS_DEl app engine)
QA_CS_AD_PS_PROSDEL_04	Population Selection Query for Batch Prospect Delete Testing	Prospect Delete by Batch (SAD_PRS_DEl app engine)
QA_CS_CC_NSLDS_UPD1	Population Selection Query for NSLDS Data Push	NSLDS Data Push (SFA_NSLDSUPDS app engine)
QA_CS_CC_NSLDS_UPD2	Population Selection Query for NSLDS Data Push	NSLDS Data Push (SFA_NSLDSUPDS app engine)
QA_CS_CC_NSLDS_UPD_DAY_BEFORE	Population Selection Query for NSLDS Data Push	NSLDS Data Push (SFA_NSLDSUPDS app engine)
QA_CS_CC_NSLDS_UPD_WEEK_BEFORE	Population Selection Query for NSLDS Data Push	NSLDS Data Push (SFA_NSLDSUPDS app engine)
QA_CS_CC_POP_ADM_PRSPCT_CAR	Population Update Query for ADM_PRSPCT_CAR	Population Selection Update where record set to ADM_PRSPCT_CAR (SCC_POP_UPD app engine)
QA_CS_CC_POP_APPL_RCR_CA	Population Update of Application Recruiter Category	Population Selection Update where record set to ADM_APPL_RCR_CA (SCC_POP_UPD app engine)
QA_CS_CC_POP_ASG_CITIZENSHIP	Population Update Query for SFA_ASG_ORG_DTL	Population Selection Update where record set to SFA_ASG_ORG_DTL (SCC_POP_UPD app engine)
QA_CS_CC_POP_CARTERM	Population Update of Student Career Term	Population Selection Update where record set to STDNT_CAR_TERM (SCC_POP_UPD app engine)
QA_CS_CC_POP_EA_PROC_STATUS	Population Update Query for SFA_EASTAGE_DTL	Population Selection Update where record set to SFA_EASTAGE_DTL (SCC_POP_UPD app engine)

Query Name	***Description***	***Process***
QA_CS_CC_POP_INSTREL	Population Selection Query for Batch Prospect Delete Testing	Population Selection Update where record set to PERS_INST_REL (SCC_POP_UPD app engine)
QA_CS_CC_POP_LOAN_ORIG_DTL	Population Update Query for LOAN_ORIG_DTL	Population Selection Update where record set to LOAN_ORIG_DTL (SCC_POP_UPD app engine)
QA_CS_CC_POP_PELL_CITIZENSHIP	Population Update Query for PELL_ORIG_DTL	Population Selection Update where record set to PELL_ORIG_DTL (SCC_POP_UPD app engine)
QA_CS_CC_POP_PELL_ORIG_FIELDS	Population Update Query for PELL_ORIGINATN	Population Selection Update where record set to PELL_ORIGINATN (SCC_POP_UPD app engine)
QA_CS_CC_POP_PKGVAR	Population Update Query for STDNT_PKG_VAR	Population Selection Update where record set to STDNT_AID_ATRBT (SCC_POP_UPD app engine) Population Selection Update where record set to STDNT_PKG_VAR (SCC_POP_UPD app engine) Population Selection Update where record set to INAS_PROF_EXT (SCC_POP_UPD app engine) Population Selection Update where record set to INAS_CALC_RECS (SCC_POP_UPD app engine)
QA_CS_CC_POP_SLC_STUDENT	Population Update Query for SFA_SLC_STUDENT	Population Selection Update where record set to SFA_SLC_STUDENT (SCC_POP_UPD app engine)
QA_CS_CC_POP_STDCAR	Query for Population Update of STDNT_CAREER	Population Selection Update where record set to STDNT_CAREER (SCC_POP_UPD app engine)
QA_CS_CC_POP_STDEQUTN	Population Update for STDNT_EQUTN_VAR	Population Selection Update where record set to STDNT_EQUTN_VAR (SCC_POP_UPD app engine)

Query Name	*Description*	*Process*
QA_CS_CC_POP_STDNTAID	Population Update Query for STDNT_AID_ATRBT	Population Selection Update where record set to STDNT_AID_ATRBT (SCC_POP_UPD app engine) Population Selection Update where record set to STDNT_PKG_VAR (SCC_POP_UPD app engine) Population Selection Update where record set to INAS_PROF_EXT (SCC_POP_UPD app engine) Population Selection Update where record set to INAS_CALC_RECS (SCC_POP_UPD app engine)
QA_CS_CC_POP_STDNT_FATERM	Population Update Query for STDNT_FA_TERM	Population Selection Update where record set to STDNT_FA_TERM (SCC_POP_UPD app engine)
QA_CS_CC_POP_LOAN_DISBMNT	Population Update for LOAN_DISBMNT	Population Selection Update where record set to LOAN_DISBMNT (SCC_POP_UPD app engine)
QA_CS_CC_POP_PELL_DISBMNT	Population Update for PELL_DISBMNT	Population Selection Update where record set to PELL_DISBMNT (SCC_POP_UPD app engine)
QA_CS_CC_PS_3CENGINE_ADMA	Population Selection and 3C Engine - ADMA	3C Engine when Administrative Function is ADMA (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_ADMP	Population Selection and 3C Engine - ADMP	3C Engine when Administrative Function is ADMP (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_AVAK	Population Selection and 3C Engine - AVAK	3C Engine when Administrative Function is AVAK (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_AVIN	Population Selection and 3C Engine - AVIN	3C Engine when Administrative Function is AVIN (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_AVMS	Population Selection and 3C Engine - AVMS	3C Engine when Administrative Function is AVMS (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_AWRD	Population Selection and 3C Engine - AWRD	3C Engine when Administrative Function is AWRD (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_FINA	Population Selection and 3C Engine - FINA	3C Engine when Administrative Function is FINA (3C ENGINE app engine)

Query Name	***Description***	***Process***
QA_CS_CC_PS_3CENGINE_GENO	Population Selection and 3C Engine -GENO	3C Engine when Administrative Function is GEN for Organization (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_GENP	Population Selection and 3C Engine -GENP	3C Engine when Administrative Function is GEN for person (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_IHC	Population Selection and 3C Engine -IHC	3C Engine when Administrative Function is IHC (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_ISIR	Population Selection and 3C Engine - ISIR	3C Engine when Administrative Function is ISIR (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_LOAN	Population Selection and 3C Engine - LOAN	3C Engine when Administrative Function is LOAN (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_PROP	Population Selection and 3C Engine - PROP	3C Engine when Administrative Function is PROP (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_PROS	Population Selection and 3C Engine - PROS	3C Engine when Administrative Function is PROS (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_PSSV	Population Selection and 3C Engine -PSSV	3C Engine when Administrative Function is ADMA (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_RSTR	Population Selection and 3C Engine -RSTR	3C Engine when Administrative Function is PSSV (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFACO	Population Selection and 3C Engine - SFAC Organization based	3C Engine when Administrative Function is SFAC for organization (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFACP	Population Selection and 3C Engine - SFAC Person Based	3C Engine when Administrative Function is SFAC for person (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFBI	Population Selection and 3C Engine - SFBI	3C Engine when Administrative Function is SFBI (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFCO	Population Selection and 3C Engine - SFCO	3C Engine when Administrative Function is SFCO (3C ENGINE app engine)

Query Name	***Description***	***Process***
QA_CS_CC_PS_3CENGINE_SFIT	Population Selection and 3C Engine - SFIT	3C Engine when Administrative Function is SFIT (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFPA	Population Selection and 3C Engine - SFPA	3C Engine when Administrative Function is SFPA (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFRC	Population Selection and 3C Engine - SFRC	3C Engine when Administrative Function is SFRC (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFRF	Population Selection and 3C Engine - SFRF	3C Engine when Administrative Function is SFRF (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFTPO	Population Selection and 3C Engine - SFTP Organization Based	3C Engine when Administrative Function is SFTP for organization (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_SFTPP	Population Selection and 3C Engine - SFTP Person Based	3C Engine when Administrative Function is SFTP for person (3C ENGINE app engine)
QA_CS_CC_PS_3CENGINE_STRM	Population Selection and 3C Engine - STRM	3C Engine when Administrative Function is STRM (3C ENGINE app engine)
QA_CS_CC_PS_SI_ACADRECRUIT	Population Selection for Service Indicators - Academic Recruits	Mass Assign Service Indicator (SCC_SI_ASSN app engine) Mass Release Service Indicator (SCC_SI_RELS app engine)
QA_CS_CC_PS_SI_ACADRECRUIT_P	Population Selection for Service Indicators - Academic Recruits	Mass Assign Service Indicator (SCC_SI_ASSN app engine) Mass Release Service Indicator (SCC_SI_RELS app engine)
QA_CS_CC_PS_SI_AMOUNTDUE_ORG	Population Selection for Service Indicators - Organization with Amounts Due	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine) Mass Release Org Service Indicator (SCC_ORG_RELS app engine)
QA_CS_CC_PS_SI_AMOUNTDUE_ORG_P	Population Selection for Service Indicators - Organization with Amounts Due	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine) Mass Release Org Service Indicator (SCC_ORG_RELS app engine)

Query Name	***Description***	***Process***
QA_CS_CC_PS_SRVCIND_ORGS	Population Selection for Service Indicators - Organizations	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine) Mass Release Org Service Indicator (SCC_ORG_RELS app engine)
QA_CS_CC_PS_SRVCIND_PERS	Population Selection for Service Indicators - Person	Mass Assign Service Indicator (SCC_SI_ASSN app engine) Mass Release Service Indicator (SCC_SI_RELS app engine)
QA_CS_CC_PS_STDNT_GRPS	Population Selection - Student Groups	Mass Contract Select (SSF_PS_TPC app engine)
QA_CS_CC_PS_USER_SCTY_REPLACE	Population Selection and User Security Replacement	Mass User Security Replacement (SCC_SCRT_UPD app engine)
QA_CS_FA_INSTPRESENT	QA_CS_FA_INSTPRESENT	Mass Packaging Select (SFA_BPKGSEL app engine)
QA_CS_FA_ISIRPRESENT	QA_CS_FA_ISIRPRESENT	Mass Packaging Select (SFA_BPKGSEL app engine)
QA_CS_FA_NEEDUPDT	Test query for Need Summary Update	Select Students for Need Summary Validation (FAPPKNSD COBOL SQL)
QA_CS_FA_NEEDUPDT_FARPK0001	Test query for Need Summary Update	Select Students for Need Summary Validation (FAPPKNSD COBOL SQL)
QA_CS_FA_NEEDUPDT_FARPK0002	Test query for Need Summary Update	Select Students for Repackaging (SFA_RPKGSEL app engine)
QA_CS_FA_NEEDUPDT_FARPK0003	Test query for Need Summary Update	Select Students for Repackaging (SFA_RPKGSEL app engine)
QA_CS_FA_NEEDUPDT_FARPK0012	Test query for Need Summary Update	Select Students for Repackaging (SFA_RPKGSEL app engine)
QA_CS_FA_SAP	Test Query for SAP Pop Selection	Process SAP (SFA_SAP_BDRV app engine)
QA_CS_FA_SFEA_UGRD	QA_CS_FA_SFEA_UGRD	SF External Award Feed (SSF_EXT_AWDS app engine)
QA_CS_FA_USER_EDIT_MSG	Test query for Population Selection for User Edit Messages	Process User Edit Messages (SFA_EDIT_MSG app engine)

Query Name	***Description***	***Process***
QA_CS_FA_USER_EDIT_MSG	Population Update Query for INAS_FED_EXT and INAS_PROF_EXT	Population Selection Update where record set to INAS_FED_EXT (SCC_POP_UPD app engine) Population Selection Update where record set to INAS_PROF_EXT (SCC_POP_UPD app engine)
QA_CS_SF_PYMTPLANS	Population Selection for Specific Account Number	Mass Contract Select (SSF_PS_TPC app engine)
QA_CS_SR_PS_TRAN_BY_PROGRAM	Query for Population Selection testing	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_PERC_ACTION_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_PERC_DROP_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_PERC_DROP_PG_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_PERC_DROP_WL_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_PERC_WARN_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_PERC_WARN_WL_LETTERS	Population Selection and 3C Engine – SENR	3C Engine when the Administrative Function is SENR (3C app engine)
SSR_REQS_ACAD_GRP	Post Enrollment Requirement query by Group	Process Batch Post Enrollment Requirement Checking (SRRQPERC) Process Batch Drop Requests for Post Enrollment Requirements: Generate and Process Drops (SRRQDROP) or Generate Drop Transactions (SSR_REQS_DRP) Print Enrollment Requirement Rosters (SSR_REQS_RPT) Purge Post Enrollment Requirement Data (SSR_REQS_PRG)
SSR_REQS_ACAD_ORG	Post Enrollment Requirement query by Org	Same as for SSR_REQS_ACAD_GRP
SSR_REQS_CAMPUS	Post Enrollment Requirement query by Campus	Same as for SSR_REQS_ACAD_GRP

Query Name	***Description***	***Process***
SSR_REQS_CAREER	Post Enrollment Requirement query by Career	Same as for SSR_REQS_ACAD_GRP
SSR_REQS_SESSION	Post Enrollment Requirement query by Session	Same as for SSR_REQS_ACAD_GRP
SSR_REQS_SUBJECT	Post Enrollment Requirement query by Subject	Same as for SSR_REQS_ACAD_GRP
SSR_REQS_SUBJECT_CATNBR	Post Enrollment Requirement query by Subject Catalog Number	Same as for SSR_REQS_ACAD_GRP
SSR_REQS_TERM	Post Enrollment Requirement query by Term	Same as for SSR_REQS_ACAD_GRP
SSR_TS_ACADLEVEL	Transcript Query by Acad Level	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_TS_ADVISOR	Transcript Query by Advisor	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_TS_CAREER	Transcript Query by Career	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_TS_PROGPLAN	Transcript Query by Prog Plan	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_TS_PROGRAM	Transcript Query by Program	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
SSR_TS_STUDENT_GRP	Transcript Query by Stdnt Grp	Process Transcripts (SSR_TSRPT Oracle BI Publisher)

Equations for Population Selection

This table lists the equations that, as of the date of this publication, the PeopleSoft system delivers for use by the Population Selection process and the processes where you can use them.

Equation Names	***Descriptions***	***Process***
ADADPSDELAPP	Population Selection AD Application Delete	Application Delete by Batch (SAD_APP_DEL app engine)
ADPDPSCARTRM	Population Selection AD Prospect Delete Career Term	Prospect Delete by Batch (SAD_PRS_DEl app engine)

Equation Names	***Descriptions***	***Process***
CC3CPSADMA	Population Selection 3C Engine ADMA	3C Engine when Administrative Function is ADMA (3C ENGINE app engine)
CCPUPSRELINS	Population Selection Update Related Institution	Population Selection Update where record set to PERS_INST_REL (SCC_POP_UPD app engine)
CCPUPSRCRCAT	Population Selection Update AD Application Recruiter Category	Population Selection Update where record set to ADM_APPL_RCR_CA (SCC_POP_UPD app engine)
CCPUPSSTAID	Population Selection Update Student Aid Attribute EmplID Range	Population Selection Update where record set to STDNT_AID_ATRBT (SCC_POP_UPD app engine)
CCSGPSERANGE	Student Groups EmplID Range	Process Student Groups (SCC_STD_GRP app engine)
CCSIPSMAORG	Population Selection Service Indicators Org	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine)
CCSIPSMAPER2	Population Selection Service Indicators Assign Person2	Mass Assign Service Indicator (SCC_SI_ASSN app engine)
CCSIPSMAPERS	Population Selection Service Indicators Assign Person2	Mass Assign Service Indicator (SCC_SI_ASSN app engine)
CCSIPSMRPERS	Population Selection SI Mass Release Person	Mass Release Service Indicator (SCC_SI_RELS app engine)
CCSIPSMRORG	Population Selection SI Mass Release Org	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine)
CCSIPSORG1	SI Population Selection Demo Org	Mass Assign Org Service Indicator (SCC_ORG_ASSN app engine)
CCUSPSUID	Population Selection User Security Update	Mass User Security Replacement (SCC_SCRT_UPD app engine)
CRINPSDEMO01	Population Selection CR Initiative Demo 1	Audience Criteria
ESTRPSBYPROG	Population Selection Transcripts By Program	Process Transcripts (SSR_TSRPT Oracle BI Publisher)
ESRRPSADV1	Population Selection AA Report Request	Generate Report Requests (SAA_RPT_RQST app engine)
FAAYPSERANGE	Population Selection FA AY Act EmplID Range	Aid Year Activate (SFA_ACTADYR app engine)

Equation Names	***Descriptions***	***Process***
FAMPPSCHAR1E	Mass Pkg Choose Char1 = E	Mass Packaging Select (SFA_BPKGSEL app engine)
FAMPPSINST	Check if INST Exists	Mass Packaging Select (SFA_BPKGSEL app engine)
FAMPPSISIR	Select those with ISIRs	Mass Packaging Select (SFA_BPKGSEL app engine)
FAMPPSREADY	Grads and Ugrads Ready to Pkg	Mass Packaging Select (SFA_BPKGSEL app engine)
FARPPSCHAR2E	Grads and Ugrads Ready to Package	Select Students for Repackaging (SFA_RPKGSEL app engine)
FASPPSGPAG24	Grads and Ugrads Ready to Package	Process SAP (SFA_SAP_BDRV app engine)
SFPPPSPPL	Population Selection for specific Account Number	Mass Contract Select (SSF_PS_TPC app engine)
SFPPPSPPLTPC	Population Selection for Range of EmplIDs	Mass Contract Select (SSF_PS_TPC app engine)

Appendix B

Campus Community Reports

This appendix provides an overview of PeopleSoft Campus Community reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

If you are implementing separate instances of your PeopleSoft Campus Solutions and PeopleSoft HCM systems, you should read the additional documentation describing those integrations. Certain items and features that are detailed in this PeopleBook may vary depending on how you configure your systems. The *CS-HCM Integration Information Knowledge Document* details the additional documents that describe the setup, functional, and technical implementation considerations.

On June 1, 2011, Oracle discontinued distribution of SAP's Business Objects Enterprise and Crystal Reports with PeopleTools. Existing customers may use Business Objects Enterprise and Crystal Reports licenses previously received from Oracle. Customers who wish to use future versions of Business Objects and Crystal Reports products with PeopleSoft will need to obtain appropriate license and support directly from SAP/Business Objects.

See Also

HRMS 9.0 Application Fundamentals PeopleBook,"PeopleSoft Application Fundamentals for HRMS Reports"

CS-HCM Integration Information, posted to My Oracle Support https://support.oracle.com

Campus Community Reports A to Z

This table lists Campus Community reports, sorted alphabetically by report ID. You might also find PeopleSoft HRMS reports useful.

See *HRMS 9.0 Application Fundamentals PeopleBook,* "PeopleSoft Application Fundamentals for HRMS Reports"

Note. Use PeopleSoft Process Scheduler to run Crystal reports.

See *PeopleTools: PeopleSoft Process Scheduler*

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PER020 Employee Home Address Listing (SQR Report)	Contains a complete listing of all employees with addresses and home phone numbers.	Workforce Administration, Personal Information, Biographical, Home Address Report	PRCSRUNCNTL
PER032 Passport/Visa Expiration (SQR Report)	Lists individuals (students, exchange visitors, and dependents) that have passports, visas, or work permits on file that expire in 90 days of the report run date. The report is divided into two sections. The first section lists passport information including country, passport number, issue date, and expiration date. The second section lists visa and work permit information including country, visa and work permit number, type of permit, issue date, and expiration date.	• Campus Community, SEVIS, Reports, Passport/Visa Expiration • Workforce Administration, Personal Information, Citizenship, Passport/Visa Expiration Audit	PRCSRUNCNTL
PER033 Citizenship/Country/Visa Audit (SQR Report)	Lists discrepancies between citizenship country/status and visa data for individuals. Displays various discrepancies found for the employee citizenship status in the Personal Data table. Looks for the country specified in the Installation table and uses it as the local country.	• Campus Community, SEVIS, Reports, Citizenship/Country/Visa Audit • Workforce Administration, Personal Information, Citizenship, Citizenship/Country/Visa Audit	PRCSRUNCNTL
PER701 Department Table (CRYSTAL)	Lists all departments by Department ID.	Set Up HRMS, Foundation Tables, Organization, Department Table Report	PRCSRUNCNTL
PER705 Department Table (CRYSTAL)	Lists each physical location by Location Code. Because you can define locations by effective date, the report program prints all locations (past, present, and future).	Set Up HRMS, Foundation Tables, Organization, Location Table Report	PRCSRUNCNTL

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
PER708 Country Table (CRYSTAL)	Prints a list of all of the countries and their character codes that are in the system.	Set Up HRMS, Install, Country Table Report	PRCSRUNCNTL

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